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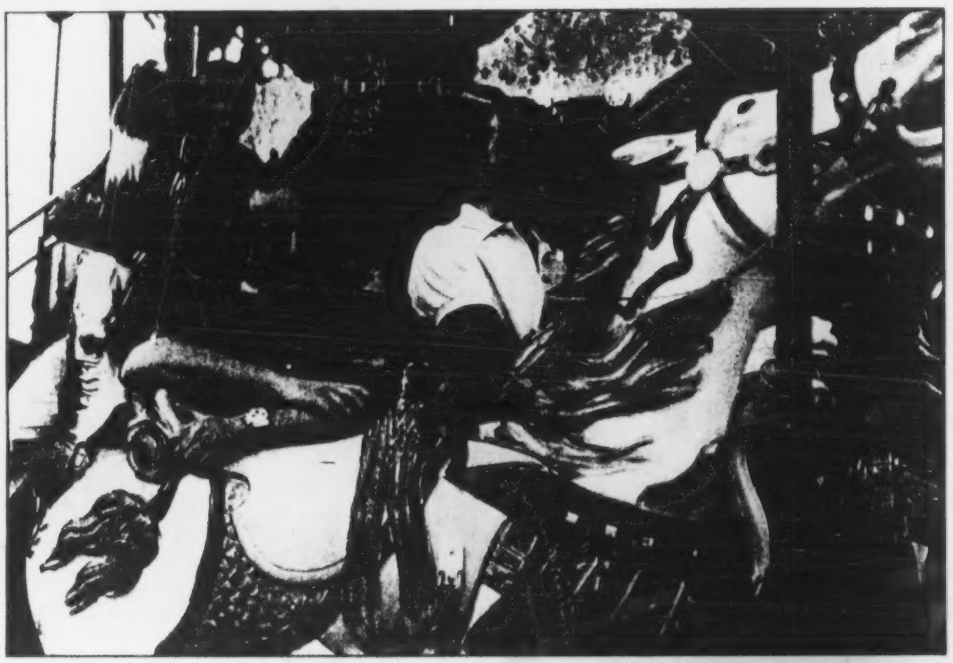
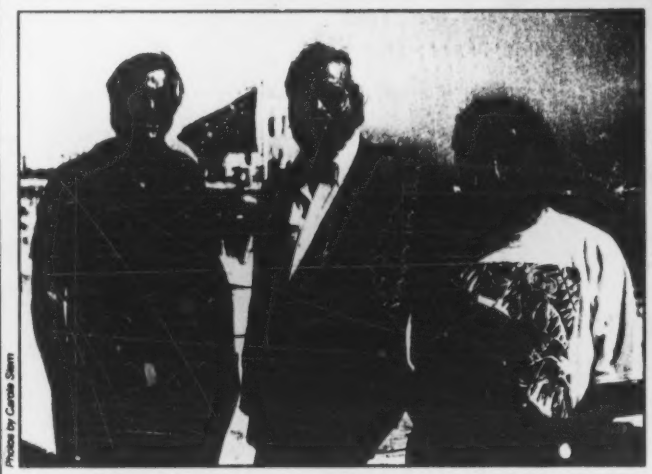
NEWSPAPER

June 26, 1989

Advertising Age

Crain's International Newspaper of Marketing. In Two Sections. Section 1.





Photos by Carole Stern

Merry-go-rounding in Cannes are (from l.) Pietro Maestri, assistant creative director at TBWA Italia, Milan, and Cannes judges Andrea Concato, partner-creative director at TBWA Italia, and Marco Mignani, partner-creative director of RSCG Italy. Andrew Langer (bottom r.), ceo-creative director at Lowe Marschalk, New York, relaxes near the beach. Sunning (bottom l.): Leighton Gage, free-lance creative director, Sao Paulo, and judges Marcio Moreira, vice chairman of McCann-Erickson Worldwide, New York, and Joao Daniel Tikhomiroff, president of the YES/-JODAF production company, Sao Paulo.

Spain fetches Cannes Grand Prix

By LAUREL WENTZ

CANNES—A mongrel helped Spain earn a symbol of the country's growing creative reputation Saturday when Madrid-based Contrapunto won the Grand Prix at the 36th International Advertising Film Festival here.

In what was considered by judges and delegates to be a mediocre year for originality and ideas, the U.S. captured only eight of the 47 gold Lions, down from 11 last year.

Fallon McElligott, Minneapolis, picked up two gold Lions, while five other agencies won one: Chiat/Day, New York; Della Femina, McNamee WCRS, New York; Leo Burnett USA, Chicago; Levine, Huntley, Schmidt & Beaver, New York; and DDB Needham Worldwide, New York. Colossal Pictures, San Francisco, a production house, also took home a gold.

Ammirati & Puris, New York, won a gold Lion for a Schweppes tonic water spot starring John Cleese, but the commercial was considered a U.K. entry.

Spain took top honors, its first Grand Prix, with

(Continued on Page 77)

Spending wave hits in 2nd half

An ADVERTISING AGE roundup

Major national advertisers are loosening the purse strings, bolstered by reports of continued economic expansion and heightened competition in virtually every industry segment.

While ad agencies and the media aren't breaking out the champagne yet, they say marketers that held back ad spending for fear of a recession are making plans for a stronger-than-expected effort in the second half of 1989.

The TV networks have probably ordered champagne, however. The Big 3 have been pleasantly surprised by a robust upfront selling season *(see story on Page 3)* and, with the addition of Fox Broadcasting Co. sales, should reap a combined $3.7 billion, a 12% increase from last year. That's being fueled by automotive spending, up an estimated 20% to 45%.

The growth may be coming from a shift back to national advertising from localized promotions, say some advertiser executives. For competitive reasons, executives say, they have to advertise now; they've held up ad budgets for as long as possible.

"This is no time to cut back advertising spending," said Charles

(Continued on Page 76)

Tambrands sets $20M shoot-out

By JUDANN DAGNOLI and LAURIE FREEMAN

Faced with declining market shares, Tambrands will consolidate its $18 million-to-$20 million domestic feminine hygiene products accounts at a single agency.

The company last week asked its three current agencies, Campbell-Mithun-Esty, Ally & Gargano and McCann-Erickson Worldwide, all New York, to participate in a creative shoot-out for the business.

CME handles the estimated $12 million-plus Tampax tampons account. Ally handles the estimated $6 million-plus Maxithins sanitary napkin line and McCann handles international advertising.

Only the Tambrands agencies were asked to pitch; the review starts in August with a decision expected by early September.

Tambrands will need stronger advertising as competition in the category increases. Rivals Procter & Gamble Co. and Kimberly-Clark Corp. plan new-product efforts this summer.

In July, P&G rolls out Always

(Continued on Page 76)

Last Minute News

Ney approved as ambassador to Canada

WASHINGTON—Former Young & Rubicam Chairman Edward Ney on Friday was confirmed by the U.S. Senate as ambassador to Canada. He will be sworn in June 28.

Lang to break away from Time Inc.

NEW YORK—Time Inc.'s 50% share of Working Woman/McCall's Group is expected to be bought by Dale Lang once New York Times Co. Magazine Group's purchase of *McCall's* is completed in mid-July. Mr. Lang, the co-

(Continued on Page 8)

Fight looms over use of :15s

By WAYNE WALLEY

NEW YORK—The 15-second commercial is about to become the focal point in a new war between advertisers and network TV.

At issue is commercial clutter and pricing.

Effective Oct. 1, ABC-TV will institute several restrictions on the use of :15s and reduce by 20% the number of :15 availabilities in prime-time shows, news programming and "Good Morning America."

Agency executives and advertisers say ABC's moves won't have an immediate effect, but most described the network's strategy as a thinly veiled maneuver to eventually increase prices for the shorter units.

"When fewer units are available, it becomes a supply-and-demand situation. This will drive up the price," said Ric Paschke, exec VP-director of media at Campbell-Mithun-Esty, Southfield, Mich.

"ABC can do anything they want to do to control inventory and pricing, but ultimately they have to be competitive," said Stephen Crews, VP-public affairs at Alberto-Culver Co., one of the first advertisers to use 15-second spots. "The buying community is not concerned. We'll just take our business elsewhere."

ABC maintained it's only trying to control commercial clutter. "Our motivation is simply to curtail the use of :15s," said Jake Keever, exec VP-sales.

Although some industry observers say the ABC plan, if successful, could become a model for other networks, neither CBS nor NBC plans to alter current policies.

The networks usually charge half the price of a :30 for a :15 spot, creating what some buyers perceive as a bargain, because studies have shown :15s are generally 70% as effective as 30-second units.

But CBS charges a premium for :15s in sporting events and only allows two :15s within a commercial pod, effectively limiting the number of shorter spots on the network.

NBC doesn't have specific limits on :15s, but President Pier Mapes has said charging premiums for :15s is "an admirable goal."

But Richard Kostyra, exec VP-U.S. director of media services at J. Walter Thompson USA, is concerned about ABC's precedent.

As part of its plan, ABC won't guarantee product exclusivity for a :15 in a given pod and it won't offer customarily free "billboards" when an advertiser buys several :15s within a specific show. A billboard is a "Brought to you by" announcement usually appearing at the start of the show.

In addition, single-product 30-second spots will take scheduling precedence over :15s. Also, ABC will charge a premium for "bookend" commercials and :15s in "NFL Monday Night Football," the World Series, Barbara Walters specials, the Academy Awards, the American Music Awards and other selected programs.

"It won't discourage the use of :15s, but it will eventually generate more revenue for the networks," Mr. Kostyra said. "If they wanted to discourage the use of :15s, they should charge the 30%-to-40% premium spot TV does."

The shorter units, which first became a factor in 1984, last year represented 36.2% of the commercials that ran on network TV, according to a JWT analysis of Broadcast Advertisers Reports figures.#

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Frito-Lay forms four divisions to further regionalize business.

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Chevrolet moves up in May ad recall with a little help from Mickey Mouse.

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Eric Dickerson is fighting for athletes' personal endorsement rights by suing the NFL for unauthorized use of his name.

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Tabloids' glitz moves to video with 'Persona'

By MARCY MAGIERA

If a new purveyor of celebrity news and gossip has its way, shoppers will have to bring along their VCRs to browse through tabloid-style news at the supermarket.

Majestic Video Publishing in late August will hit supermarket checkouts with "Persona Video Magazine," believed to be the first mass-market, general-interest magazine on videocassette.

"Persona," priced at $4.95, is a 90-minute entertainment "magazine." To make the cost more palatable, "Persona" is on a two-hour videocassette that can be reused as a blank tape.

The monthly magazine is the brainchild of Majestic CEO Charles-Terry Goldstein and his wife, Majestic President Karen Jackovich, who previously was a special correspondent for *People* and West Coast editor of the *Star*.

It will initially be sold in Colorado and Indiana, where Majestic will test its marketing plan before a state-by-state rollout.

Majestic plans to distribute "Persona" nationally by February, Mr. Goldstein said. The format will include two 15-to-20-minute celebrity interviews, one at the start and one at the end of the program, and shorter news and feature segments on topics including entertainment and people behind the scenes in Hollywood.

Commercials will run between segments.

Majestic hasn't yet sold any of the 20 minutes it's allocated for commercials. Mr. Goldstein said the company is approaching TV networks, movie studios and record companies.

Culver City, Calif.-based Majestic also hopes to appeal to marketers like Procter & Gamble Co. that are looking for new advertising and promotion vehicles.

"Persona's" only advertiser so far is 3M, which will insert coupons in the video box. 3M also will pack a coupon for "Persona" in its videotapes.

Majestic is asking $2,500 for a 30-second spot and $40,000 for an ad on the back "cover" of the video box.

It will support "Persona's" launch with a $300,000 spot TV, cable, radio and print campaign in Colorado and Indiana.

Mr. Goldstein said Majestic plans to spend $5 million on a national campaign starting in February.

Kaiser McEuen, Los Angeles, is Majestic's agency.#

Bond may move in with Stroh family

By PATRICIA STRNAD

If Bond Corp. Holdings succeeds in acquiring part of Stroh Brewery Co., Hal Riney & Partners' long-awaited image campaign for Stroh could be obsolete before it even airs.

The campaign, scheduled for July but pushed back to August, was expected to center on the Detroit brewery's family heritage.

Australia-based Bond last week said it's negotiating to buy part of Stroh but is interested only in a controlling stake. Bond is discussing a proposal to swap its 20% stake in Lonrho, a London-based mining and agriculture company, for an interest in Stroh.

Bond said it'd merge No. 3 Stroh with No. 5 G. Heileman Brewing Co., acquired by Bond in 1987, if ultimately successful.

Privately held Stroh repeated earlier statements that it's seeking only a minority investor.

San Francisco-based Riney took the $30 million account from Lowe Marschalk, New York, last July, and its first image campaign for Stroh's and Stroh's Light has been eagerly awaited.

Five radio spots using actor Richard Widmark as narrator and a "Beer of the worlds" theme break today.

The spots liken the unusual nature of Stroh's, "fire-brewed, fam-

(Continued on Page 76)

Autos up TV prices for all

Big 3 eye 10%-to-15% gains

By WAYNE WALLEY

Automakers, by spending upwards of $700 million, have turned the booming 1989-90 network TV prime-time upfront selling season into a seller's market.

Advertisers, originally anticipating 8%-to-9% increases on a cost-per-thousand basis, are facing possible 10%-to-15% hikes as the Big 3 networks try to stand firm on prices during ongoing upfront negotiations.

"Certain clients will be penalized because the automotives, with all this money to sell cars, are killing us," said an agency executive who asked not to be identified. The fact that "the automotives overpaid to get exclusivities [and that] the networks held them to higher prices" has affected the entire marketplace.

"Anyone who can get a deal at 13% or under will consider it 'good' this year because the networks are bullish," he said. "The real issue is if the agencies can sell the increases to clients."

The prime-time upfront market, when advertisers buy time in network shows as much as a year in advance, started to move two weeks ago with automakers and movie studios making the first deals.

Those involved believe prime-time negotiations with other categories could be completed this week with some late-night and daytime sales starting now and carrying over after July 4.

"If I were in another industry, I wouldn't be too happy right now either," said Ric Paschke, exec VP-director of media at Campbell-Mithun-Esty, Southfield, Mich., agency for Chrysler Corp.'s Jeep/-Eagle division. "There's a finite number of commercials to be sold, and when demand goes up, prices go up."

But even if automakers spent more than $700 million in upfront, "there's still $3 billion in inventory left," said Jon Mandel, VP-director of national broadcast at Grey Advertising, New York. "The idea is for the networks to get the regular guy, who doesn't have any reason to pay an increase, to pay more because the cars did."

Apparently the market is moving in the networks' favor.

"The indicators are showing a double-digit increase," said Larry Hoffner, senior VP-sales at NBC-TV. "We see sufficient strength in the market and in our schedule. There is competition for the good inventory. People don't want to be locked out."

The strong upfront sales for network prime-time, which looks to be a record $3.7 billion (AA, June 5), is also benefiting network TV's competition: Fox Broadcasting Co., barter syndication and cable TV.

For example, Fox now expects to do some $300 million in upfront sales, triple last year's take, with CPM increases averaging between 8% and 10%.

The fourth network is "seeing a real rush of money" across the board, with automotive upfront spending up 600%, said Jon Nesvig, Fox's senior VP-sales.

Cable TV networks expect to double upfront sales this year to $400 million, while barter syndication upfront sales could go as high as $700 million, sources said.

Tim Duncan, executive director of the Advertiser Syndicated Television Association, couldn't confirm the upfront sales estimate. However, he said the organization has revised syndication's estimated annual ad revenues for 1989 to $1.1 billion from $1.05 billion #

World News Roundup

MADRID—Philip Morris Cos. boosted 1989 ad spending in Spain 56% to $15.8 million. Marlboro, PM's top brand, will be backed with $9.5 million. Leo Burnett SA handles Marlboro.

STUTTGART—Mercedes-Benz is hearing pitches from Borsch, Stengel & Partner, Frankfurt; Grey Duesseldorf, and Springer & Jacoby, Hamburg, for its estimated $12 million German passenger car account. Dewe Werbung previously handled.

LONDON—Swissair retained GGK for its $4 million account. KHBB; Adolf Wirz, Zurich; and Aebi, Suter, Gisler, Studer/BBDO, Zurich, pitched.

SYDNEY—Australian Broadcasting Corp., a non-commercial, government funded organization, is suing AGB McNair Anderson for alleg-

(Continued on Page 36)

A SWEETENER SAMPLING

INGREDIENT SWEETENERS

Company	Brand or Generic name	Ad Budget
Pfizer	Alitame*	$25-30 million
McNeil	Sucralose*	$25-30 million
Monsanto	NutraSweet	$20 million
Hoechst Celanese	Sunette	under $10 million

Company	Brand	Ad Budget
Monsanto	Equal (NutraSweet)	$14 million
Cumberland Packing	Sweet 'N Low	$2 million
Stadt Corp.	Sweet One (Sunette)	$5 million
United Sweetener	Sweetmatch	Unknown

*Food & Drug Administration approval pending. Source: ADVERTISING AGE

NutraSweet rivals stirring

By JUDANN DAGNOLI

Sweeping changes are coming in the $1 billion sugar-substitute market as companies gear up to challenge NutraSweet Co.'s aspartame.

Lining up to chip away at NutraSweet parent Monsanto Co.'s dominance are Pfizer; McNeil Specialty Products, a Johnson & Johnson unit; Hoechst Celanese Corp.; and United Sweetener USA.

All are expected to hit the market with competing products between now and the time NutraSweet's patent on aspartame expires in 1992.

Other food companies are also developing sweeteners, including Kraft General Foods Group and Procter & Gamble Co.

But dislodging NutraSweet, with an estimated 65% share of the category, could be a daunting task. The company's $20 million-plus ad campaign from Ogilvy & Mather, Chicago, has firmly entrenched NutraSweet and its red swirl logo in consumers' minds.

"It will be open warfare," said Tom Fucigna, group management supervisor at Pedone & Partners, New York, agency for Cumberland Packing Corp.'s Sweet 'N Low tabletop sweetener and Sweet One, a new tabletop entry that uses Hoechst's Sunette.

Pfizer and McNeil are expected to give NutraSweet the biggest run for its money. Those companies are expected to spend a combined $60 million-plus advertising their ingredient sweeteners, assuming

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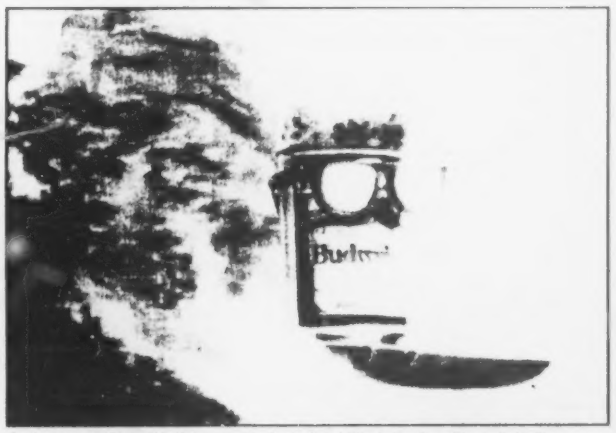
HOT STUFF

Breaking campaigns



Anheuser-Busch this week breaks "Bud to the Beach," the successor to the "Bud Bowl I" campaign that aired during the Super Bowl telecast. The Budweiser and Bud Light spots parody 1960s beach movies. D'Arcy Masius Benton & Bowles, St. Louis, handles.

A Long John Silver's customer suddenly starts talking like a pirate in a new spot TV campaign breaking today. The commercial promotes a "$2.99 Meal Deal" and the chain's 20th anniversary. It's the first creative from Bozell, Dallas, since it won the account.

Marshalls, T.J. Maxx duel over off-price leadership

By JUDITH GRAHAM

Off-price retailers are readying new ad campaigns in the fierce battle for leadership in the $13.5 billion-plus business.

Marshalls, the nation's largest off-price retailer by dollar sales volume, should show its cards during the back-to-school ad season with new work from AC&R, New York, the winner last week of the $25 million account (AA, June 19).

No. 2 T.J. Maxx is said to be preparing a new ad thrust to refresh its 2-year-old "Never the same place twice" campaign. The timing of the new work, however, couldn't be determined. Ingalls, Quinn & Johnson, Boston, is the agency.

Both competitors are expanding at a breakneck pace. Marshalls, with 317 stores in 40 states, is planning to add 40 outlets a year in the next five years; T.J. Maxx, with 328 stores in 40 states, plans 45 additions annually.

"It's like Coke and Pepsi between Marshalls and T.J. Maxx, and Marshalls clearly wants to be Coke," said Douglas Houston, chairman-creative director at Houston Advertising, Boston, an unsuccessful finalist in the Marshalls review.

"We need to tell consumers who we are, because there are so many price-oriented messages being thrown at them."

But in a selling environment increasingly cluttered with regular markdowns and "everyday low price" marketing messages, both retailers will have to educate consumers about the nature of off-price retailing.

Off-price retailers carry high-quality brand name merchandise at prices 20% to 60% below department stores' prices.

"We need to tell consumers who we are, because there are so many price-oriented messages being thrown at them," said Karen Claunch, advertising manager at T.J. Maxx.

During their heyday in the late 1970s and early 1980s, off-price retailers gave department stores a run for their money.

Since then, however, off-price retailers have experienced a shakeout as department stores turned the tables by regularly slashing prices. Discounters, which don't carry the same high-quality brands, have become the fastest-growing retail segment at $74.6 billion in 1987.

Now, the off-price marketing challenge is to marry a price message with a high-quality image message and to differentiate stores from discounters.

"Consumers often perceive us as a

(Continued on Page 75)

Mickey drives up Chevy ad recall

By SCOTT HUME

The heartbeat of Americans picks up when they see Mickey Mouse.

On ABC-TV's March 29 Academy Awards telecast, Chevrolet began a $70 million campaign for its new Lumina line. Initial TV spots showed a variety of animated Walt Disney Co. characters—including Mickey and Minnie Mouse, the Seven Dwarfs and others—emerging from the vehicles at the new Disney/MGM Studio theme park as crowds cheered (AA, March 27).

The General Motors Corp. division has kept the Disney connection with Lumina in the heavy-TV and print schedule that has followed, and the Disney magic has been rubbing off.

Last month, Chevrolet was the nation's second-best-recalled advertiser in ADVERTISING AGE's exclusive adWatch survey of ad awareness.

Chevrolet obviously was already among the most well-recognized and well-recalled advertisers, but Mickey has helped. In March, when the Lumina campaign began, Chevrolet held the No. 5 spot. In April, the Disney characters helped Chevrolet move up to No. 3.

ADWATCH SURVEY OF ADVERTISING AWARENESS TOP 10 IN MAY

Last month, 1,000 people were asked: Of all the advertising you have seen, heard or read in the past 30 days, which advertisement first comes to mind? Source: Gallup Organization, Lincoln, Neb.

Rank 5/89	4/89	Advertiser	Agency
1	1	Pepsi-Cola	BBDO Worldwide
2	3	Chevrolet	Lintas:Campbell-Ewald
3	4	Ford	J. Walter Thompson USA
4	6	Coca-Cola	McCann-Erickson Worldwide
5	2	McDonald's	Leo Burnett USA
6	5	Budweiser/Bud Light	D'Arcy Masius Benton & Bowles/DDB Needham Worldwide
7	—	Miller	Backer Spielvogel Bates/Leo Burnett USA
8*	7	Tide	Saatchi & Saatchi Advertising
8*	9	Toyota	Saatchi & Saatchi DFS
10	—	Nissan	Chiat/Day

* indicates tie

The advertiser that kept Chevrolet from gaining the top spot in unaided awareness was Pepsi-Cola, holding the No. 1 ranking for the third consecutive month.

Chevrolet did emerge as the best-recalled advertiser when respondents were asked to name the first auto or truck advertiser that came to mind.

With 21% of first mentions, Chevrolet edged out Ford (20.8%), which had held the No. 1 spot every month but one (February 1989) in the past four years.

Toyota held the No. 3 spot in the car category last month with 8.2% of first mentions.

It may be worth noting, meanwhile, that GM's new Geo line (also sold by Chevrolet) has received fairly low recall. Geo's advertising got only a 9.4% share of both unaided (overall) and aided (specifically for auto advertising) recall questions.

Another marketer seeing its recall level rise thanks to new advertising is Wendy's International.

Wendy's in April launched a campaign claiming victory in consumer taste tests conducted with its competition. Featured as TV pitchman for the campaign is R. David Thomas, the fast-food chain's founder (AA, April 10).

Mr. Thomas tells viewers, "Our hamburgers are the best in the business, or I wouldn't have named the place after my daughter."

The impact of that message has been immediate and substantial. In April, when respondents were asked to name the first fast-food advertiser to come to mind, Wendy's share of first mentions jumped 4.8 points to 11.5%.

Last month, it increased another 2.7 points to 14.2% of first mentions, meaning Wendy's has more than doubled recall of its advertising in two months. That was enough to pass Burger King Corp. (11.7%) and put Wendy's in second place behind McDonald's Corp. (46.4%).

This is the first time Wendy's has taken the No. 2 spot since the August 1985 survey.

AdWatch is a joint project of AD AGE and the Gallup Organization. Awareness is measured by asking a nationally projectable sample to name the first advertising that comes to mind from all seen, heard or read in the previous 30 days.

Last month, 1,000 adults were polled by phone. The margin of error is plus or minus 3.1%.

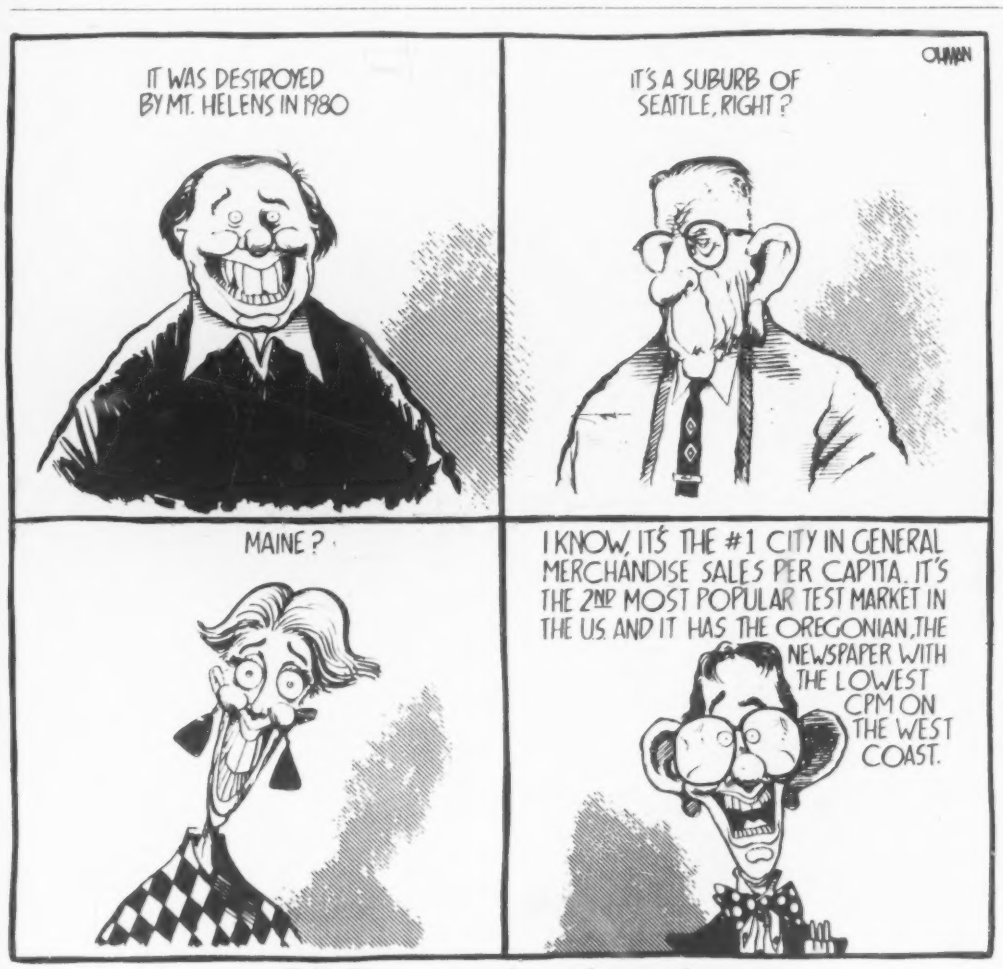
In other categories of interest:

- Pepsi-Cola kept the No. 1 spot in the **soft-drink** category with a 37.4% share of first mentions in May, down from 40.5% in April. No. 2 Coca-Cola closed the gap, rising to 30.1% last month from 27.6% in April.

  Diet Coke remained No. 3 with a 6.3% share.
- Apple Computer failed to reverse the downward slide in recall it's suffered since the December survey, when it commanded 42% of first mentions in the **computer** category. In May, Apple still was No. 1 but down to a 29% share of first mentions (virtually unchanged from 29.2% in April).

  IBM Corp. remained No. 2, with a 23.1% share, up from 20.8% a month earlier. Radio Shack last month received 2.5% of first mentions (down from 3.2%) to hold third place.#

For more information, contact the Gallup Organization, 301 S. 6th St., Lincoln, Neb. 68506. Phone: (402) 489-0351.


IT WAS DESTROYED BY MT. HELENS IN 1980
IT'S A SUBURB OF SEATTLE, RIGHT?
MAINE?
I KNOW, IT'S THE #1 CITY IN GENERAL MERCHANDISE SALES PER CAPITA. IT'S THE 2ND MOST POPULAR TEST MARKET IN THE US AND IT HAS THE OREGONIAN, THE NEWSPAPER WITH THE LOWEST CPM ON THE WEST COAST.

Where the heck is Portland?

Portland and The Oregonian. It's a sales story that stumps 3 out of 4. Amaze your friends and clients with your ability to spot a terrific market. Call Brian Bounous, General Advertising Manager at (503) 221-8279 for the complete story.

The Oregonian

Represented nationally by Newhouse Newspapers
Source: Saatchi & Saatchi DFS Compton
Based on actual number of new products tested

New 'Chip 'N Dale' to get $30M effort

By WAYNE WALLEY

Walt Disney Co. is putting its money where its chipmunks are this fall.

Buena Vista Television, Disney's TV syndication division, along with Kellogg Co. and McDonald's Corp., will spend $30 million to support the Sept. 18 launch of "Chip 'N Dale's Rescue Rangers."

That's believed to be the most expensive campaign ever waged for a new syndicated TV show.

The goal is "to reach every child in America," said Carole Black, Buena Vista Television senior VP-marketing.

Neither Kellogg nor McDonald's would discuss specific plans for fall or holiday tie-ins. But Ms. Black said the promotions would offer some sort of consumer benefit and described the McDonald's effort as a "huge national campaign."

The promotions aren't tied to media buys, but both Kellogg and McDonald's have been advertisers in Buena Vista's "DuckTales," the top-rated syndicated kids' show.

The addition of "Chip 'N Dale" is expected to give Buena Vista a one-two Disney punch and form the cornerstone of the Disney Afternoon, a two-hour weekday children's programming block to be offered for the fall of 1990.

"Disney's Gummi Bears," fresh from a Saturday morning run on ABC-TV, and "Tale Spin," a new animated Disney series, will complete the lineup.

Bob Jacquemin, president of Buena Vista Television, said at least 95 stations covering 80% of the country have already committed to the programming block, while some 160 stations covering 93% of the country will carry "Chip 'N Dale" this fall.

Posters, outdoor boards and tram cards will promote the show in theme parks, while tent cards will be placed in all Disney hotels.

Plush toys will be available as premium items with purchase of Disney videocassettes, and the characters will tour major cities and will star in a music video and a theatrical film to be released in 1991.

In addition, Buena Vista will run spots on cable TV and print ads in selected magazines and newspapers, and will launch its own viewership contest the week of Sept. 25 with $250,000 in prizes.

Western International Media, Los Angeles, handles media buying.

The Disney plan and its early acceptance by TV stations underscores a renewed interest in animation.

Warner Bros., with Steven Spielberg, is producing an updated version of its classic "Looney Tunes" show called "Tiny Tunes," to be available in 1990. Fox Broadcasting Co. affiliates plan to launch a Kids Network block at the same time.#

100 media companies hit $66.1 billion

Cap Cities/ABC heads the pack with cable and magazines posting robust gains; newspapers, the leading category, show weak 3.9% advance

By R. CRAIG ENDICOTT

A strong showing from cable and magazine operations of the nation's 100 leading media companies propelled the group's 1988 net revenues to $66.1 billion, an increase of 9.9% over the prior year, according to ADVERTISING AGE's ninth annual 100 Leading Media Companies report.

Capital Cities/ABC retained its crown as the nation's biggest media company with net revenues from media of $4.59 billion, up 7.8%. A ticket to the 1989 listing required net revenues of at least $131.7 million, the total generated by No. 100 Berkshire Hathaway—one of 13 companies new to the list.

The net revenue growth of both cable and magazines, with increases of 23.9% and 13% over 1987 levels, respectively, reflected their strength as advertising media during 1988. And this power punch continued to pack a wallop through the first quarter of 1989.

Newspapers, with $24.8 billion in net revenues, up 3.9% over the prior year, remained the leader in media category revenue volume, well ahead of TV at $15.2 billion, up 6.3%. The slow growth for newspapers, however, dropped the category share from 39.6% of the media pie for the Top 100 in 1987 to 37.5% in 1988.

Cable picked up the two percentage points lost by newspapers. It reached $11.5 billion, stimulated by heavy acquisition activity and a strong surge in advertising.

Advertising on cable, including network and non-network, increased to $1.19 billion in 1988, up 23.6% from 1987. Cable networks contributed 79%, or $942 million, to the total. That upward curve carried into the first quarter of '89 as cable networks pushed advertising to $308.7 million, up 40.5%.

Such movement is likely to continue as more households are linked to cable and advertisers increasingly bring cable into their media mix. The Cabletelevision Advertising Bureau estimates 70% of American households will receive cable by 1994, up from 55% at the end of 1988. Penetration levels already show cable as a worthy contender for advertising dollars traditionally charted for broadcast TV.

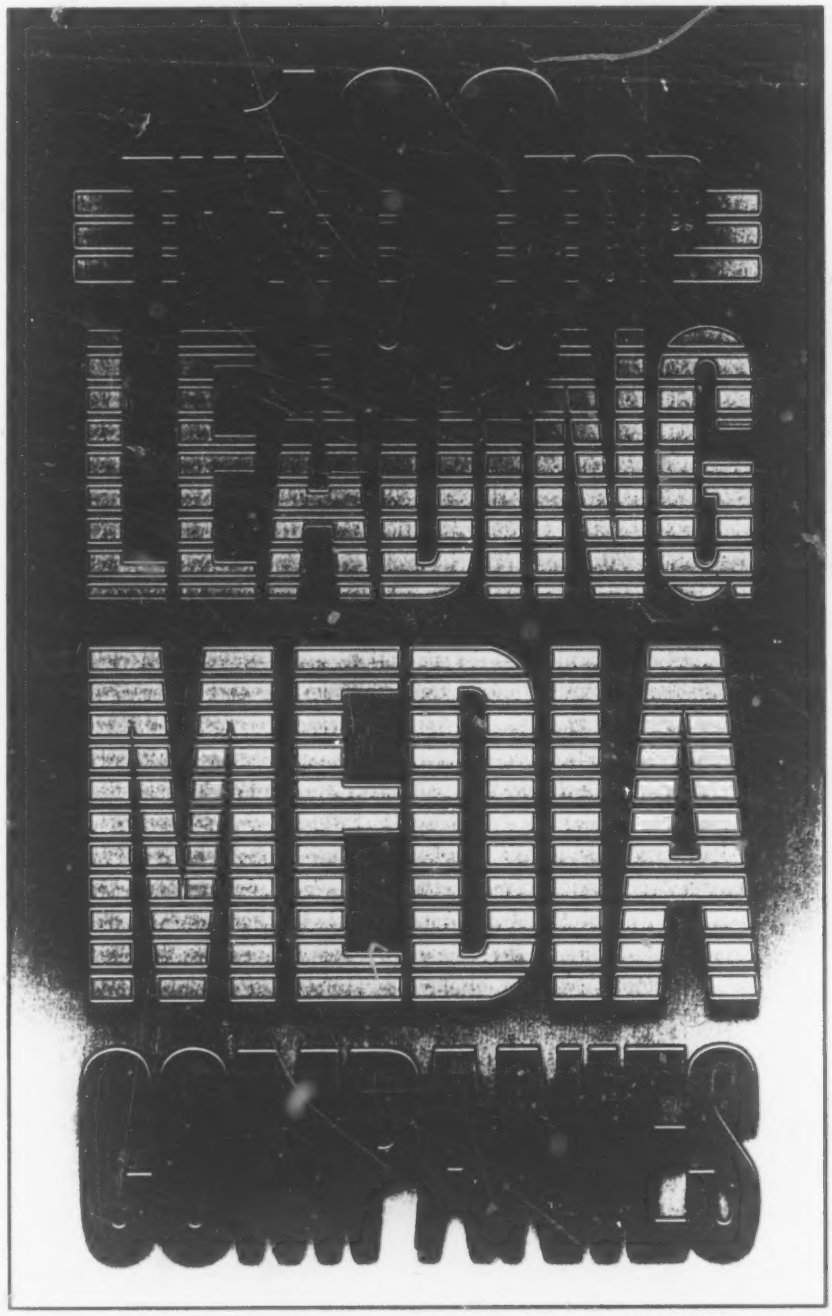
Supercharged buying activity among cable multiple system operators in 1988 and early 1989 influenced some of the more dramatic ranking jumps on AA's Top 100 list. Tele-Communications Inc. moved from No. 17 in 1987 to No. 11 in 1988, largely with its buyout of United Artists Communications. This month TCI merged UA with United Cable Television Corp. to form United Artists Entertainment Co., ranked No. 27 based on a pro forma reading of the merged company.

Virtually all the cable companies completed Olympian jumps on the chart. Continental Cablevision leaped from No. 35 in 1987 to No. 22 in 1988; Turner Broadcasting System from No. 36 to No. 26; Warner Communications from No. 38 to No. 30; Cablevision Systems Corp. from No. 56 to No. 31; and Comcast Corp. from No. 58 to No. 39, to cite a few.

Cable also drew the most newcomers to the list, including No. 75 Adelphia Communications Corp., No. 81 Cablevision Industries Corp., No. 82 Houston Industries, and No. 83 Century Communications Corp. The one cable departure, Rogers Communications (its U.S. cable properties), actually shows up in revenues of Houston Industries, the buyer.

Magazines, with a performance somewhat less flashy than cable, nevertheless turned in a solid composite tally of $10.3 billion and accounted for 15.5% of the total media pie, up from 15.1% in the prior year. Much of that growth was fed by an 8.7% increase in industrywide ad revenues for 1988 totaled by Publishers Information Bureau, monitor of most of the top magazines owned by the nation's Top 100 Media companies.

This medium seems poised for continued growth in 1989. First quarter '89 results placed magazine advertising at $1.58 billion, up 9.5%. Equally impressive was the fact that eight of the top 10 magazine ad categories showed above-average growth for the quarter.



Graphic by AVID Productions/Chicago

Acquisitions reshaped this category from the prior year as three companies dropped from the Top 100 list and four others came aboard. Multimedia mogul Rupert Murdoch triggered the Top 100 Media's biggest acquisition when his News Corp. purchased Triangle Publications (*TV Guide*, *Seventeen*, *Daily Racing Form* and *Good Food*) from founder Walter Annenberg for $3.2 billion. Triangle was ranked No. 21 last year.

Working Woman/McCall's Group, ranked No. 80 last year, dropped from the chart when its lead publication, *McCall's*, was sold for $80 million to the New York Times Co., this year's No. 12. International Thomson Holdings, last year's No. 28, underwent an identity change as its magazines were merged with Thomson Newspapers, last year's No. 34, to form Thomson Corp., this year's No. 17.

Macfadden Holdings, publishing most magazines with "True" heading the title, and Boston Ventures purchased *National Enquirer* and *Weekly World News* from GP Group for $412.5 million, thereby nicking the Top 100 list. Whittle Communications, the media innovator that has created controversy from the doctor's waiting room to the high school classroom, entered the list at No. 87. And two business press publishers, Crain Communications Inc., publisher of ADVERTISING AGE and 25 other business and trade publications, and CMP Publications, entered at Nos. 95 and 98, respectively. Crain returned after a one-year hiatus.

Net revenues from TV grew 6.3% to $15.2 billion among the 42 media companies with TV properties. TV gained and lost a Top 100 listing in 1988 as RKO General, No. 74 last year, began selling off its broadcast media after the FCC ruled it an "unfit" licensee. A 12.2% gain in net revenues to $136.3 million by Univision Holdings enabled the broadcaster with Spanish-language network and owned-and-operated stations to join the list. Its competitor, Telemundo Group, fell short of the list. Telemundo's 21.4% gain, to $102.1 million in net revenues, and Univision both bore witness to the surge in marketing to Hispanics.

While TV category was growing at a composite 6.3% rate, the Top 100's radio category shot up 11.1% to $1.04 billion. Advertising for the entire medium, depressed in 1986 and 1987, grew by 8.2% to $7.8 billion in 1988, according to Radio Advertising Bureau. Media pundits link radio's strength to TV's woes. As its prices rise and audiences shrink, TV is hearing that it is becoming less cost effective for advertisers.

First quarter 1989 tallies for radio show a continued upward curve in advertising while TV ad spending dropped again.

The biggest stir in radio came this April when No. 21 Westinghouse Electric Corp. acquired 10 more radio properties for $385 million. Westinghouse is moving to supplant Cap Cities/ABC as the medium's top revenue generator. Cap Cities/ABC claimed the medium lead with $202.2 million in net revenues in 1988, CBS Inc. took second with $164.7 million followed by Westinghouse at $111.6 million.

The Top 100 Media's "other" category, largely comprised of outdoor, free-standing inserts and newswire operators, grew 22.1% to $3.34 billion. Two from last year's list, both FSI companies, were purchased by News Corp.—Quad/Graphics and Product Movers, ranked Nos. 69 and 70 last year. This left No. 40 Valassis Inserts as the only FSI independent on the new list.

A 23.1% growth at Amni America (formerly Winston Network) produced record net revenues of $136 million to qualify the outdoor company for No. 97. The Top 100's only other independent outdoor company is Patrick Media Group, No. 79.

Although media operations of the 49 public companies on the Top 100 chart increased 9.4% in net revenues to $41.6 billion, they declined as a percentage of total corporate reve-

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100 leading media companies by revenue

Rank 1988	Rank 1987	Company, headquarters	Total media revenue 1988	Total media revenue 1987	% chg	Newspaper revenue 1988	Newspaper revenue 1987	Magazine revenue 1988	Magazine revenue 1987	Broadcast revenue 1988	Broadcast revenue 1987	Cable revenue 1988	Cable revenue 1987	Other media revenue 1988	Other media revenue 1987
1	1	**Capital Cities/ABC**, New York	$4,588.5	$4,256.2	7.8	$468.9	$447.7	$370.0	$374.8	$3,508.5	$3,213.0	$241.1	$220.7	—	—
2	2	**Time Inc.**, New York	3,686.0	3,306.0	11.5	—	—	1,752.0	1,621.0	—	—	1,934.0	1,685.0	—	—
3	3	**General Electric Co.**, Fairfield, Conn.	3,638.0	3,241.0	12.2	—	—	—	—	3,638.0	3,241.0	—	—	—	—
4	4	**Gannett Co.**, Arlington, Va.	3,211.3	2,991.3	7.4	2,594.3	2,432.5	—	—	390.5	357.0	—	—	226.5	201.8
5	5	**CBS Inc.**, New York	2,776.8	2,761.8	0.5	—	—	—	—	2,776.8	2,761.8	—	—	—	—
6	6	**Times Mirror Co.**, Los Angeles	2,677.9	2,548.9	5.1	1,997.7	1,995.9	298.5	203.1	99.0	110.1	282.7	239.8	—	—
7	7	**Advance Publications**, Newark, N.J.	2,655.5	2,482.0	7.0	1,681.1	1,601.0	745.0	678.0	—	—	229.4	203.0	—	—
8	9	**Knight-Ridder**, Miami	2,077.1	1,943.9	6.9	1,917.4	1,844.6	—	—	—	—	—	—	159.7	99.3
9	10	**Hearst Corp.**, New York	1,986.0	1,886.0	5.3	689.0	650.0	919.0	873.0	263.0	262.0	15.0	11.0	100.0	90.0
10	11	**Tribune Co.**, Chicago	1,985.5	1,875.7	5.9	1,561.7	1,465.7	—	—	423.8	410.0	—	—	—	—
11	17	**TCI**, Denver	1,705.1	1,225.1	39.2	—	—	—	—	—	—	1,705.1	1,225.1	—	—
12	12	**New York Times Co.**, New York	1,700.1	1,642.4	3.5	1,380.1	1,348.6	249.1	226.1	62.5	60.5	—	—	8.4	7.2
13	14	**News Corp.**, Sydney	1,683.3	1,250.0	34.7	195.7	260.9	509.6	332.8	620.0	576.8	—	—	358.0	79.5
14	13	**Cox Enterprises**, Atlanta	1,578.2	1,463.6	7.8	739.0	710.6	—	—	367.4	328.0	471.8	425.0	—	—
15	15	**Washington Post Co.**, Washington	1,305.6	1,240.3	5.3	682.7	648.1	327.5	322.2	180.2	171.4	115.2	98.6	—	—
16	19	**Scripps Howard**, Cincinnati	1,203.3	1,128.5	6.6	839.7	818.2	—	—	214.1	198.2	149.5	112.1	—	—
17	34	**Thomson Corp.**, Toronto	1,126.0	973.4	15.7	530.0	445.4	596.0	528.0	—	—	—	—	—	—
18	20	**Viacom International**, New York	1,113.8	938.5	18.7	—	—	—	—	141.2	132.1	972.6	806.4	—	—
19	16	**Dow Jones & Co.**, New York	973.1	987.7	(1.5)	937.1	948.7	36.0	39.0	—	—	—	—	—	—
20	24	**Ingersoll Publications Co.**, Princeton, N.J.	645.0	609.0	5.9	645.0	609.0	—	—	—	—	—	—	—	—
21	25	**Westinghouse Electric Corp.**, Pittsburgh	632.8	600.5	5.4	—	—	—	—	632.8	600.5	—	—	—	—
22	35	**Continental Cablevision**, Boston	622.0	442.0	40.7	—	—	—	—	—	—	622.0	442.0	—	—
23	29	**Reader's Digest Assn.**, Pleasantville, N.Y.	600.4	522.2	15.0	—	—	600.4	522.2	—	—	—	—	—	—
24	30	**Advo-System**, Windsor, Conn.	589.0	520.5	13.2	—	—	—	—	—	—	—	—	589.0	520.5
25	22	**MediaNews Group**, Dallas	572.4	650.0	(11.9)	572.4	650.0	—	—	—	—	—	—	—	—
26	36	**Turner Broadcasting System**, Atlanta	537.6	436.4	23.2	—	—	—	—	—	—	537.6	436.4	—	—
27	NA	**United Artists Entertainment Co.**, Denver	513.6	431.6	19.0	—	—	—	—	—	—	513.6	431.6	—	—
28	18	**McGraw-Hill**, New York	509.8	466.7	9.2	—	—	413.7	377.0	96.1	89.7	—	—	—	—
29	31	**Affiliated Publications**, Boston	506.5	472.8	7.1	444.5	441.9	62.0	30.9	—	—	—	—	—	—
30	38	**Warner Communications**, New York	496.4	425.0	16.8	—	—	40.0	38.0	—	—	456.4	387.0	—	—
31	56	**Cablevision Systems Corp.**, Woodbury, N.Y.	493.5	299.5	64.8	—	—	—	—	—	—	493.5	299.5	—	—
32	33	**Meredith Corp.**, Des Moines, Iowa	474.7	449.2	5.7	—	—	365.1	329.4	109.6	119.8	—	—	—	—
33	23	**Storer Holdings**, Miami	472.1	419.8	12.5	—	—	—	—	—	—	472.1	419.8	—	—
34	27	**Harte-Hanks Communications**, San Antonio, Texas	462.7	520.0	(11.0)	342.4	351.1	—	—	26.0	58.4	—	—	94.3	110.5
35	39	**Media General**, Richmond, Va.	449.4	424.1	6.0	301.1	287.7	13.5	15.9	61.8	60.0	73.0	60.5	—	—
36	42	**Freedom Newspapers**, Irvine, Calif.	432.0	392.0	10.2	353.0	325.0	—	—	79.0	67.0	—	—	—	—
37	48	**Cahners Publishing Co.**, Newton, Mass.	420.0	340.0	23.5	—	—	420.0	340.0	—	—	—	—	—	—
38	37	**Central Newspapers**, Indianapolis	417.6	402.7	3.7	417.6	402.7	—	—	—	—	—	—	—	—
39	58	**Comcast Corp.**, Bala Cynwyd, Pa.	404.1	286.8	40.9	—	—	—	—	—	—	404.1	286.8	—	—
40	41	**Valassis Inserts**, Livonia, Mich.	400.0	400.0	0.0	—	—	—	—	—	—	—	—	400.0	400.0
41	44	**Pulitzer Publishing Co.**, St. Louis	391.0	367.3	6.5	287.2	270.0	—	—	103.8	97.3	—	—	—	—
42	43	**A.H. Belo Corp.**, Dallas	385.4	381.7	1.0	220.1	216.2	—	—	165.3	165.5	—	—	—	—
43	46	**Chronicle Publishing Co.**, San Francisco	384.0	357.0	7.6	234.0	221.0	—	—	96.0	90.0	54.0	46.0	—	—
44	45	**Morris Communications**, Augusta, Ga.	382.6	359.0	6.6	258.3	246.0	—	—	—	—	—	—	124.3	113.0
45	47	**Copley Newspapers**, La Jolla, Calif.	381.3	353.4	7.9	373.9	350.0	—	—	—	—	7.4	3.4	—	—
46	40	**Multimedia Inc.**, Greenville, S.C.	374.0	352.6	6.1	135.2	128.1	—	—	136.9	133.7	101.9	90.8	—	—
46	32	**Oklahoma Publishing Co.**, Oklahoma City	374.0	320.0	16.9	125.0	125.0	—	—	156.0	134.0	93.0	61.0	—	—
48	53	**Hachette Publications**, Paris	366.0	321.0	14.0	—	—	366.0	321.0	—	—	—	—	—	—
49	51	**Landmark Communications**, Norfolk, Va.	363.6	336.1	8.2	303.5	283.4	—	—	27.9	26.8	32.2	25.9	—	—
50	49	**Gillett Holdings**, Nashville	354.0	340.0	4.1	—	—	—	—	354.0	340.0	—	—	—	—
51	50	**McClatchy Newspapers**, Sacramento, Calif.	352.6	328.9	7.2	352.6	328.9	—	—	—	—	—	—	—	—
52	55	**International Data Group**, Framingham, Mass.	352.0	300.0	17.3	—	—	352.0	300.0	—	—	—	—	—	—
53	52	**Reuters Holdings PLC**, London	351.3	293.5	19.7	—	—	—	—	—	—	—	—	351.3	293.5
54	57	**Cowles Media Co.**, Minneapolis	315.0	295.1	6.7	273.0	267.1	42.0	28.0	—	—	—	—	—	—
55	54	**Donrey Media Group**, Fort Smith, Ark.	300.0	287.0	4.5	228.1	215.2	—	—	9.6	10.8	10.3	9.0	52.0	52.0
56	62	**Cooke Media Group**, Middleburg, Va.	287.0	235.0	22.1	110.0	96.0	—	—	—	—	177.0	139.0	—	—
57	60	**Journal Communications**, Milwaukee	274.9	249.2	10.3	222.2	200.9	—	—	52.7	48.3	—	—	—	—
58	61	**Associated Press**, New York	261.3	239.3	9.2	—	—	—	—	—	—	—	—	261.3	239.3
59	67	**3M**, St. Paul	249.6	217.0	15.0	—	—	—	—	—	—	—	—	249.6	217.0
60	63	**National Geographic Society**, Washington	245.4	223.4	9.8	—	—	245.4	223.4	—	—	—	—	—	—
61	59	**Providence Journal Co.**, Providence, R.I.	243.0	265.0	(8.3)	133.0	124.0	—	—	32.0	62.0	78.0	79.0	—	—
62	65	**Chicago Sun-Times Co.**, Chicago	235.4	220.0	7.0	235.4	220.0	—	—	—	—	—	—	—	—
63	66	**Lee Enterprises**, Davenport, Iowa	234.8	223.4	5.1	166.9	160.6	—	—	67.9	62.8	—	—	—	—
64	68	**Chris-Craft Industries**, New York	230.6	216.7	6.4	—	—	—	—	230.6	216.7	—	—	—	—
65	71	**Blade Communications**, Toledo, Ohio	225.2	202.1	11.4	174.0	158.0	—	—	16.2	15.1	35.0	29.0	—	—
66	72	**Sammons Communications**, Dallas	215.8	201.7	7.0	—	—	—	—	—	—	215.8	201.7	—	—
67	NA	**Macfadden Holdings**, New York	209.0	NA	NA	164.0	—	45.0	—	—	—	—	—	—	—
68	81	**Dispatch Printing Co.**, Columbus, Ohio	204.4	173.5	17.8	140.0	130.0	2.1	3.5	62.3	40.0	—	—	—	—
69	77	**Great American Communications Co.**, Cincinnati	200.4	190.3	5.3	—	—	—	—	200.4	190.3	—	—	—	—
70	78	**Seattle Times Co.**, Seattle	200.0	190.0	5.3	200.0	190.0	—	—	—	—	—	—	—	—
70	91	**Ziff Communications**, New York	200.0	145.0	37.9	—	—	200.0	145.0	—	—	—	—	—	—
72	75	**Times Publishing Co.**, St. Petersburg, Fla.	194.0	183.4	5.8	169.1	160.6	24.9	22.8	—	—	—	—	—	—
73	76	**Howard Publications**, Oceanside, Calif.	190.0	192.0	(1.0)	155.0	155.0	—	—	20.0	22.0	15.0	15.0	—	—
74	87	**Petersen Publishing Co.**, Los Angeles	186.7	162.4	15.0	—	—	186.7	162.4	—	—	—	—	—	—
75	NA	**Adelphia Communications Corp.**, Coudersport, Pa.	185.0	131.4	40.8	—	—	—	—	—	—	185.0	131.4	—	—
76	84	**Forbes Inc.**, New York	181.4	166.0	9.3	6.4	6.0	175.0	160.0	—	—	—	—	—	—
77	85	**Maclean Hunter**, Toronto	181.1	163.2	11.0	—	—	70.0	67.9	—	—	111.1	95.3	—	—
78	88	**TeleCable Corp.**, Norfolk, Va.	180.0	157.0	14.6	—	—	—	—	—	—	180.0	157.0	—	—
79	79	**Patrick Media Group**, Scranton, Pa.	175.0	163.0	7.4	—	—	—	—	—	—	—	—	175.0	163.0
80	82	**Macromedia Inc.**, Hackensack, N.J.	173.4	168.1	3.2	147.1	142.7	—	—	26.3	25.4	—	—	—	—
81	118	**Cablevision Industries Corp.**, Liberty, N.Y.	170.2	130.5	30.4	—	—	—	—	—	—	170.2	130.5	—	—
82	NA	**Houston Industries**, Houston, Texas	162.9	142.6	14.2	—	—	—	—	—	—	162.9	142.6	—	—
83	NA	**Century Communications Corp.**, New Canaan, Conn.	160.0	106.0	50.9	—	—	—	—	—	—	160.0	106.0	—	—
84	89	**LIN Broadcasting**, New York	158.4	156.2	1.4	—	—	21.2	19.4	137.2	136.8	—	—	—	—
85	90	**Times Journal Co.**, Springfield, Va.	157.1	145.5	8.0	157.1	145.5	—	—	—	—	—	—	—	—
86	98	**Bonneville International Corp.**, Salt Lake City	154.1	137.7	11.9	—	—	—	—	154.1	137.7	—	—	—	—
87	113	**Whittle Communications**, Nashville	152.0	106.0	43.4	—	—	96.6	67.4	—	—	—	—	55.4	38.6
88	100	**TVX Broadcasting Group**, Virginia Beach, Va.	150.8	133.4	13.0	—	—	—	—	150.8	133.4	—	—	—	—
89	96	**General Media International**, New York	150.0	139.7	7.4	—	—	150.0	139.7	—	—	—	—	—	—
90	97	**Park Communications**, Ithaca, N.Y.	149.6	138.8	7.8	87.3	76.9	—	—	62.3	61.9	—	—	—	—
91	93	**Edyell Communications**, Cleveland	148.3	143.5	3.3	—	—	148.3	143.5	—	—	—	—	—	—
92	92	**Playboy Enterprises**, Chicago	143.8	144.9	(0.8)	—	—	120.4	115.7	—	—	23.4	29.2	—	—
93	83	**U.S. News & World Report**, Washington	141.8	124.2	14.2	—	—	141.8	124.2	—	—	—	—	—	—
94	95	**H&C Communications**, Houston	140.0	140.0	0.0	—	—	—	—	140.0	140.0	—	—	—	—
95	102	**Crain Communications**, Chicago	137.2	128.0	7.2	—	—	136.8	127.7	0.4	0.3	—	—	—	—
96	106	**Univision Holdings**, New York	136.3	121.5	12.2	—	—	—	—	136.3	121.5	—	—	—	—
97	NA	**Ameri America**, New York	136.0	110.5	23.1	—	—	—	—	—	—	—	—	136.0	110.5
98	111	**CMP Publications**, Manhasset, N.Y.	133.0	111.0	19.8	113.0	94.8	20.0	16.2	—	—	—	—	—	—
99	NA	**DTH Media**, Dallas	132.5	NA	NA	132.5	—	—	—	—	—	—	—	—	—
100	104	**Berkshire Hathaway**, Omaha	131.7	123.0	7.1	131.7	123.0	—	—	—	—	—	—	—	—

Notes: Dollars are in millions. Revenues by media are Advertising Age estimates. Rankings for 1987 are based on AA's 1987 ranking of media companies. See Page S-12 for methodology.

Compiled by: Craig Endicott and Julie Doherty. AA chart: Kevin Brown

Papers take beating as revenues gain 3.9%

While leaders' revenues hit $24.7 billion in category, several show chinks in their armor

The Top 100 Media Companies with newspaper operations showed no immunity from a sluggish newspaper advertising market last year. Their 1988 revenues advanced only 3.9% to $24.7 billion.

The slow growth by the 50 companies in the newspaper category fell short of the 6.1% growth in newspaper advertising that totalled $31.2 billion nationwide. Using a standard advertising-to-circulation ratio of 4-to-1 for newspaper revenue composition, the 50 represented 63% of all newspaper advertising in the U.S.

The Newspaper Advertising Bureau predicted a similar growth rate for all papers in 1989 but it may have to adjust that prediction. First quarter results show advertising at $7.31 billion, up only 3.5% from the prior year. Components of that growth were retail at $3.61 billion, up 4.8%; classified, $2.81 billion, up 2.4%; and national, $895 million, up 1.7%. Advertising, whether measured as revenue, linage or inches, took a beating among some of the leaders. *The New York Times* tumbled 5% in linage, although circulation grew to an all-time high. Ad inches dropped 5.7% at Affiliated's *The Boston Globe* as daily circulation advanced beyond 1987 levels. The aftershock of the stock-market crash in late 1987 continued to trip up advertising at Dow Jones' *The Wall Street Journal*, which reported an 11.6% slump in ad linage and a 4.8% dip in circulation. Times Mirror's newspaper division showed a slight erosion in total advertising revenue, although circulation revenue growth pushed overall division revenues slightly ahead of '87 totals.

Operations remained sluggish at some of these big dailies in the first quarter 1989: *WSJ* reported an 11% drop in ad linage, traced again to a decline in financial services advertising, and *The New York Times* dropped 7.2%, due to reduced financial advertising and slow economic growth in New York.

Influencing the lackluster year for newspapers was the flat year recorded by the big newspaper insert suppliers, Valassis Inserts, Quad Graphics and Product Movers. The latter two companies left the Top 100 Media chart as independent media companies because of their purchase by News Corp. in 1988. They were Nos. 69 and 70, respectively, on last year's chart.

Two big newspaper acquisitions provided the ticket to the Top 100 chart for two media companies: No. 99 DTH Media, essentially the *Dallas Times Herald* after its sale by Media News Group to John Buzzetta, a business partner of Dean Singleton (MediaNews); and No. 67 Macfadden Holdings via its purchase with Boston Ventures of the *National Enquirer* from GP Group. Also joining the chart after an absence of one year was Berkshire Hathaway at No. 100.

Thomson Corp., the new entity growing out of the merger of Thomson Newspapers and International Thomson Holdings, proved the most active acquirer among the 50. Thomson purchased nine dailies and eight weeklies as it boosted its newspaper revenues 19%—second highest gain among the newspaper operations.

The highest year-to-year gain of 19.2% lifted No. 98 CMP Publications onto the Top 100 Media chart for the first time. The Manhasset, N.Y., media company is active in newspaper and magazine publishing with lead titles *Electronic Engineering Times* and *InformationWeek*.

Centralized buying in newspaper chains gained momentum this year in deals with Sears, Roebuck & Co. struck by Gannett Co. and Harte-Hanks Communications. By covering preprinted and display advertising in the arrangement, Gannett, for example, enables Sears to place one order for nearly 80 of the chain's newspapers. Before, it would have to buy space on a market-by-market basis.

Newspapers are likely to get competition from new quarters in 1989 as telephone companies, free of government restrictions, enter the electronic publishing field. Newspapers have lobbied to close off this business to phone companies, claiming it would be unfair competition.

But set to expire in August is a restriction prohibiting AT&T from entering electronic publishing—part of the '82 consent decree that broke up AT&T. Bills freeing up the Baby Bells from the decree have been introduced in Congress this year. The consent decree only prevents telephone companies from engaging in the content-generating side. They can be carriers. Nynex in April launched a computer network that will feed over phone lines news headlines, arts calendars, TV schedules, movie guide, sports scoreboard, shopping by computer, stock and futures prices, mortgage rates and a joke of the day. Nynex will serve as carrier for a consortium of businesses, including a number of media companies.

In the category of "If you can't beat 'em, join 'em," the *Hartford Courant* is in its third month of producing FaxPaper, a legal-sized single-sheet fax summarizing the late-breaking news. The price: $1,000 a year. The sheet's ETA is 5 p.m. weekdays. The paper has yet to explore advertising in FaxPaper, but has a number of marketing angles in the works, such as getting health clubs and restaurants to subscribe as a customer service. [ ]

Biggest newspaper deals by leading media cos.

Property	Buyer	Seller	Price
National Enquirer, Weekly World News	Macfadden Holdings/Boston Ventures	GP Group	$412.5
Pasadena (Calif.) *Star-News**	Media News Group	Knight-Ridder	55.0
Nine newspapers (Ind., Ky., N.C.)**	Park Communications	NA	13.8
Pioneer Press	Chicago Sun-Times	Field Corp.	NA
Bridgeport (Conn.) *Post, Olean* (N.Y.) *Times Herald*	Thomson Newspapers	NA	NA

Notes: Dollars are in millions. *Includes its suburban newspapers, *Arcadia Tribune*, (Duarte) *Duartean, Monrovia News Post, Temple City Times*. **Includes dailies, *Eden Daily News*, Eden and Rockingham County, North Carolina; and *Commonwealth Journal*, Somerset, Ky.

Media companies ranked by newspaper revenue

Rank 1988	Rank 1987	Company	Newspaper revenue 1988	Newspaper revenue 1987	Newspaper revenue % chg	All media revenue 1988	Newspaper revenue % all media	Top newspaper by daily circulation: Newspaper	Circulation 3/31/89	'89-'88 % chg
1	1	**Gannett Co.**	$2,594.3	$2,432.5	6.7	$3,211.3	80.8	*USA Today*	1,656,467	4.4
2	2	**Times Mirror Co.**	1,997.7	1,995.9	0.1	2,677.9	74.6	*Los Angeles Times*	1,119,840	(1.2)
3	3	**Knight-Ridder Newspapers**	1,917.4	1,844.6	3.9	2,077.1	92.3	*Detroit Free Press*	629,275	(2.9)
4	4	**Advance Publications**	1,681.1	1,601.0	5.0	2,655.5	63.3	(Newark, N.J.) *Star-Ledger*	458,049	(0.4)
5	5	**Tribune Co.**	1,561.7	1,465.7	6.5	1,985.5	78.7	*New York Daily News*	1,230,186	(4.1)
6	6	**New York Times Co.**	1,380.1	1,348.6	2.3	1,700.1	81.2	*New York Times*	1,117,376	3.6
7	7	**Dow Jones & Co.**	937.1	948.7	(1.2)	973.1	96.3	*Wall Street Journal*	1,931,410	(4.6)
8	8	**Scripps Howard**	839.7	818.2	2.6	1,203.3	69.8	*Rocky Mountain News*	365,493	2.4
9	9	**Cox Enterprises**	739.0	710.6	4.0	1,578.2	46.8	(Atlanta) *Constitution*	282,442	3.6
10	10	**Hearst Corp.**	689.0	650.0	6.0	1,986.0	34.7	*Houston Chronicle*	427,844	3.9
11	12	**Washington Post Co.**	682.7	648.1	5.3	1,305.6	52.3	*Washington Post*	812,419	0.3
12	13	**Ingersoll Publications**	645.0	609.0	5.9	645.0	100.0	*New Haven* (Conn.) *Register*	103,507	0.5
13	11	**Media News Group**	572.4	650.0	(11.9)	572.4	100.0	*Houston Post*	322,193	6.6
14	15	**Thomson Corp.**	530.0	445.4	19.0	1,126.0	47.1	*Bridgeport* (Conn.) *Post*	56,117	(5.4)
15	14	**Capital Cities/ABC**	468.9	447.7	4.7	4,588.5	10.2	*Kansas City Times*	275,016	(2.0)
16	16	**Affiliated Publications**	444.5	441.9	0.6	506.5	87.8	*Boston Globe*	460,199	1.6
17	17	**Central Newspapers**	417.6	402.7	3.7	417.6	100.0	*Arizona Republic*	372,209	4.4
18	19	**Copley Newspapers**	373.9	350.0	6.8	381.3	98.1	*San Diego Union*	269,190	2.3
19	21	**Freedom Newspapers**	353.0	325.0	8.6	432.0	81.7	(Orange County, Calif.) *Register*	344,965	6.1
20	20	**McClatchy Newspapers**	352.6	328.9	7.2	352.6	100.0	*Sacramento Bee*	251,120	0.3
21	18	**Harte-Hanks Communications**	342.4	351.1	(2.5)	462.7	74.0	*Corpus Christi Caller*	67,628	(2.5)
22	23	**Landmark Communications**	303.5	283.4	7.1	363.6	83.5	*Norfolk Virginian-Pilot*	148,621	3.5
23	22	**Media General**	301.1	287.7	4.7	449.4	67.0	*Tampa Tribune*	287,289	5.9
24	24	**Pulitzer Publishing Co.**	287.2	270.0	6.4	391.0	73.5	*St. Louis Post Dispatch*	378,225	0.0
25	25	**Cowles Media Co.**	273.0	267.1	2.2	315.0	86.7	*Minneapolis Star Tribune*	403,300	(0.7)
26	27	**Morris Communications**	258.3	246.0	5.0	382.6	67.5	(Jacksonville) *Florida Times-Union*	156,839	(1.1)
27	29	**Chicago Sun-Times Co.**	235.4	220.0	7.0	235.4	100.0	*Chicago Sun-Times*	554,670	(1.1.3)
28	28	**Chronicle Publishing Co.**	234.0	221.0	5.9	384.0	60.9	*San Francisco Chronicle*	556,196	(2.3)
29	31	**Donrey Media Group**	228.1	215.2	6.0	300.0	76.0	*Las Vegas Review Journal*	134,491	9.2
30	32	**Journal Communications**	222.2	200.9	10.5	274.9	80.8	*Milwaukee Journal*	275,778	(2.9)
31	30	**A.H. Belo Corp.**	220.1	216.2	1.8	385.4	57.1	*Dallas Morning News*	359,976	(0.8)
32	33	**Seattle Times**	200.0	190.0	5.3	200.0	100.0	*Seattle Times*	236,563	0.4
33	26	**News Corp.**	195.7	260.9	(25.0)	1,683.3	11.6	*Boston Herald*	360,046	1.6
34	36	**Blade Communications**	174.0	158.0	10.1	225.2	77.3	*Toledo Blade*	154,592	(0.2)
35	35	**Times Publishing Co.**	169.1	160.6	5.3	194.0	87.2	*St. Petersburg Times*	375,870	10.7
36	34	**Lee Enterprises**	166.9	160.6	3.9	234.8	71.1	*Quad City Times*	55,183	(2.4)
37	NA	**Macfadden Holdings**	164.0	NA	NA	209.0	78.5	*National Enquirer*	4,383,227	(2.2)
38	38	**Times Journal Co.**	157.1	145.5	8.0	157.1	100.0	*Fairfax* (Va.) *Journal*	56,365	5.1
39	37	**Howard Publications**	155.0	155.0	0.0	190.0	81.6	*Hammond* (Ind.) *Times*	66,861	2.0
40	39	**Macromedia Inc.**	147.1	142.7	3.1	173.4	84.8	(Hackensack, N.J.) *Record*	156,761	1.4
41	40	**Dispatch Printing Co.**	140.0	130.0	7.7	204.4	68.5	*Columbus* (Ohio) *Dispatch*	257,366	(0.1)
42	41	**Multimedia Inc.**	135.2	128.1	5.5	374.0	36.1	*Greenville* (S.C.) *News*	86,506	0.5
43	43	**Providence Journal Co.**	133.0	124.0	7.3	243.0	54.7	(Providence, R.I.) *Evening Bulletin*	102,916	(1.4)
44	48	**DTH Media**	132.5	NA	NA	132.5	100.0	*Dallas Times Herald*	222,147	(1.8)
45	44	**Berkshire Hathaway**	131.7	123.0	7.1	131.7	100.0	*Buffalo News*	320,003	1.5
46	42	**Oklahoma Publishing Co.**	125.0	125.0	0.0	374.0	33.4	(Oklahoma City) *Oklahoman*	229,008	(3.6)
47	46	**CMP Publications**	113.0	94.8	19.2	132.0	85.6	*Electronic Engineering Times*	123,728	3.1
48	45	**Cooke Media Group**	110.0	96.0	14.6	287.0	38.3	*Los Angeles Daily News*	183,402	5.0
49	47	**Park Communications**	87.3	76.9	13.5	149.6	58.4	*Lockport* (N.Y.) *Union-Sun & Journal*	18,434	0.3
50	48	**Forbes Inc.**	6.4	6.0	6.7	181.4	3.5	*Somerset* (N.J.) *Messenger Gazette*	15,000	NA
		TOTALS	24,726.0	23,520.2	5.1	39,795.0	62.1		23,033,659	22.5

Notes: Dollars are in millions. Rankings given for 1987 in this table are based on figures restated or estimated in 1988, some of which are pro forma. Only companies among the 100 leading media companies are ranked in this table. **Sources:** Newspaper revenues are Advertising Age estimates. Daily circulation from Audit Bureau of Circulations Fas-Fax Report, March 31, 1989. Percent change on circulation computed from March 31, 1988 figures, not shown.

Radio revenue growth, up 11.1%, outstrips TV

Biggest broadcast deals by leading media cos.

Property	Buyer	Seller	Price
10 radio stations*	Westinghouse Electric	Metropolitan Broadcasting, Legacy Broadcasting	$385.0
KHJ-TV, Los Angeles	Walt Disney Co.	RKO General	320.0
WPRI-TV, Providence, WTKR, Norfolk	Narragansett Capital	Knight-Ridder	150.0
WSMV-TV, Nashville	Cook Inlet Corp.	Gillett Holdings	125.0
NBC o&o radio stations	Emmis Broadcasting	General Electric	121.5
TVX Broadcast Group**	Paramount Communications	Salomon Brothers	115.0
WKRN-TV, Nashville, WTEN-TV, Albany	Young Broadcasting	Knight-Ridder	82.0
WCIX-TV, Miami	CBS Inc.	TVX Broadcasting Group	59.0
WWJ/WJOI-FM, Detroit	CBS Inc.	Federal Broadcasting	58.0
KTVY-TV, Oklahoma City	Palmer Communications	Knight-Ridder	46.0

Notes: Dollars are in millions. *WNEW-FM, New York; KTWA-FM, Los Angeles; WMMR-FM, Philadelphia; WLLZ-FM, Detroit; WCPT/WLXR-FM, Washington; KILT-AM-FM, Houston; KDWB-AM-FM, Minneapolis. ** Pending.

First quarter '89 shows fragility as net TV spending actually drops

TV revenues for the 42 companies among the 100 Media elite that have broadcasting operations reached $15.2 billion, up 6.3%. The growth rate matches TV advertising returns from all stations for the year.

Advertising on TV (without cable) in 1988 grew 6.3% to $24.5 billion, according to the Television Bureau of Advertising.

Network television, aided by the Olympic Games and the presidential elections, accounted for 37.5% of the total.

First quarter 1989 results show the importance of those stimuli: Advertising actually dropped to $4.83 billion, down 0.7% from the prior-year period.

Among the components, network TV showed the only quarter-to-quarter decline, down 7.6% to $2.27 billion. Spot local and national syndication grew 2.7%, 5.4% and 31.6%, respectively, according to the TVB.

With the increasing fragmentation of TV audiences, the relatively lackluster year for stations and affiliate compensation agreements by networks under review, the purchase of TV stations slowed last year.

But this has led to no shortage of properties on the market. Some 30 of 600 network-affiliated stations were looking for buyers at the end of 1988.

Debt writedown, loss of license and reorganization led to the sale of stations among the Top 100 Media companies. RKO General, No. 74 on last year's list, is being forced to liquidate its TV holdings. The FCC ruled RKO an unfit licensee in 1987 but has been approving station settlements on a case-by-case basis. RKO's biggest property, KHJ-TV, Los Angeles, was sold to Walt Disney Co. for $324 million.

TVX Broadcast Group is expected to be bought out soon by Paramount Communications, the new name for Gulf & Western.

Paramount has an option to buy 79% of the company from Salomon Brothers, which gained control of TVX when the company defaulted on its loan from Salomon. TVX had planned to raise the funds from junk bond sales, but those plans collapsed along with the market in October 1987.

Gillett Holdings incurred heavy debt in 1987 with the purchase of six major market network affiliates from SCI Holdings and has begun to sell stations to meet payments.

Earlier this year, its Nashville NBC affiliate, WSMV-TV, was sold to Cook Inlet Corp. of Anchorage for $130 million.

Gillett also has been negotiating on-and-off with investment banker Dillon, Read & Co. to sell its CBS affiliate in Cleveland, WJW-TV, and NBC affiliate in Baltimore, WMAR-TV, but no agreement yet has been reached, according to Gillett.

Knight-Ridder in early 1989 moved to reduce $1 billion in debt by selling its eight TV stations. They account for only about 5% of total company revenue.

To date, K-R has agreed to sell KTVY-TV, Oklahoma City; WPRI-TV, Providence; WTKR-TV, Norfolk; WKRN-TV, Nashville; and WTEN-TV, Albany, for a total of $278 million.

LIN Broadcasting Corp. faces a buyout from McCaw Communica-

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tions, the nation's largest cellular telephone company. McCaw made a cash offer for LIN in early June after LIN announced plans to spin off its TV properties from its cellular telphone business. McCaw already owns 9.8% of LIN.

As networks struggled to maintain their audience shares, Fox TV network viewership increased. Nielsen Media Research rating (TV households) of 6.3 and share (percent of sets in use) of 10 were reported for Fox's Sunday night fare from Sept. 1 through April 16, 1989. This compares with a 4.1 rating and 7 share of a year ago.

Fox Broadcasting Co. currently has 126 affiliates reaching 90% of country, up from 87% coverage in February 1988.

The network's answer to cable TV's continued strong growth has been to join 'em. The move is out of necessity because TV networks can't own second networks or programming.

Through its newly formed NBC Cable unit, NBC introduced Consumer News and Business Channel (CNBC), a 24-hour consumer-oriented business news program service expected to reach about 10 million cable subscribers in 1989. NBC also purchased 50% of Cablevision Systems Corp.'s nine programming services, including SportsChannel America, a new national cable service NBC will help develop and manage.

NBC, having acquired the broadcast rights to the 1992 Summer Olympics in Barcelona, also will develop a pay-per-view cable Olympic package in addition to its live coverage beamed back to the U.S.

Cap Cities/ABC has been involved in cable through its ownership positions in Arts & Entertainment (38%), Lifetime (33%) and ESPN (80%). The all-sports cable network last year concluded a four-year $400 million deal with Major League Baseball to televise 175 games each year.

Revenues from radio increased 11.1% to $1.04 billion among 21 radio-involved media companies on the Top 100 chart. This outpaced the rest of the radio industry. As a whole, radio attracted $7.8 billion in advertising during 1988, up 8.2% from the prior year, according to the Radio Advertising Bureau.

Of the total, local spot accounted for $6 billion, up 9%; national spot totalled $1.4 billion, a 6.6% increase, and network reached $425 million, up only 3%.

The increase, following a meager 3.8% growth in 1987 and a poor showing in 1986, was attributed in part to the higher costs and declining audience of network TV.

During the first quarter 1989, radio continued to benefit as a TV alternative, from heavy auto company rebate programs and Sears, Roebuck & Co.'s move to greater localization of its marketing budget budget.

These factors combined to accelerate network radio advertising by 12.4% over first quarter 1988, national spot, 6.3%, and local 8%, according to RAB.

As a result of the strong quarter, the RAB is expected to revise its 1989 projections, previously set at 4%-5% growth for network, 5%-6% for national spot, and 8%-9% for local.

Good radio properties continued to sell at a premium. In Los Angeles, the nation's biggest radio market, KJOI-FM sold for $79 million in mid-1988, and KFAC-FM, a classical music station, went for $55 million—22 times annual cash flow of $2.5 million—early this year. Radio stations generally sell for 10 times cash flow.

The biggest radio deal involved the $385 million purchase by Westinghouse Electric Co. of 10 radio stations owned by Metropolitan Broadcasting Corp. and Legacy Broadcasting.

Notably absent from the radio chart is General Electric, whose NBC subsidiary sold off five of its seven radio properties to Emmis Broadcasting for $121.5 million. The remaining stations subsequently were sold.

NBC's chief broadcast competitors, Capital Cities/ABC and CBS Inc., remained firmly fixed in the Nos. 1 and 2 positions, respectively, in revenues derived from radio properties.

Cap Cities/ABC is poised to move higher in 1989 with its acquisition of WWJ and WJOI-FM Detroit. It paid Federal Broadcasting Co. $58 million.

Now that FCC regulations have increased the maximum number of stations owned by a single operator from 12 to 24 (CBS and Cap Cities/ABC both have 18), collecting of radio properties is heavy. Several non-100 Media companies are experiencing rapid growth from such accumulation. These companies with revenue estimates and station counts include Infinity, $111.6 million from 13 stations; Emmis Broadcasting, $88.7 million from 10 stations; Malrite, $72.2 million from 11, and Greater Media, $66.2 million from 13.

The industry launched an innovative campaign earlier this year that one RAB official characterized as "marketing by denial." To dramatize the impact of radio on American life, some 8,000 stations went silent for 30 seconds during early-morning rush hour. ||

Media companies ranked by TV revenue

Rank 1988	Rank 1987	Company	TV revenue 1988	TV revenue 1987	% chg	All media revenue 1988	TV revenue % all media	*Top TV station by average households reached* Station	Avg. h'hlds 2/89	'88-'87 % chg
1	1	General Electric Co.	$3,638.9	$3,241.0	12.2	$3,638.0	100.0	KNBC, NBC, Los Angeles	321,613	0.2
2	2	Capital Cities/ABC	3,306.3	3,028.7	9.2	4,588.5	72.1	WABC, ABC, New York	532,935	(18.4)
3	3	CBS Inc.	2,612.1	2,611.4	0.0	2,776.8	94.1	WCBS, CBS, New York	401,432	(8.8)
4	4	News Corp.	620.0	576.8	7.5	1,683.3	36.8	WNYW, FOX, New York	346,062	4.8
5	5	Westinghouse Electric Corp.	521.2	500.5	4.1	632.8	82.4	KYW, NBC, Philadelphia	185,338	(0.2)
6	6	Tribune Co.	378.6	366.2	3.4	1,985.5	19.1	WPIX, IND, New York	256,086	12.8
7	7	Gillett Holdings	354.0	340.0	4.1	354.0	100.0	WJBK, CBS, Detroit	123,711	(7.9)
8	8	Gannett Co.	305.5	277.6	10.1	3,211.3	9.5	WUSA, CBS, Washington	136,569	(6.6)
9	9	Cox Enterprises	286.6	266.8	7.4	1,578.2	18.2	WSB, ABC, Atlanta	133,864	0.9
10	10	Hearst Corp.	234.7	236.8	(0.9)	1,986.0	11.8	WCVB, ABC, Boston	158,813	(13.6)
11	11	Chris-Craft Industries	230.6	216.7	6.4	230.6	100.0	KCOP, IND, Los Angeles	163,207	(10.1)
12	12	Scripps Howard	197.2	182.3	8.2	1,203.3	16.4	WXYZ, ABC, Detroit	176,246	(16.7)
13	13	Washington Post Co.	180.2	171.4	5.1	1,305.6	13.8	WDIV, NBC, Detroit	174,551	1.9
14	14	A.H. Belo Corp.	165.3	165.5	(0.1)	385.4	42.9	WFAA, ABC, Dallas	158,158	1.1
15	17	TVX Broadcasting Group	150.8	133.4	13.0	150.8	100.0	KTXA, IND, Dallas	44,950	18.7
16	18	Oklahoma Publishing Co.	148.9	126.6	17.6	374.0	39.8	KTVT, IND, Dallas	86,571	46.1
17	15	H&C Communications	137.5	137.5	0.0	140.0	98.2	KPRC, NBC, Houston	100,228	0.2
18	16	LIN Broadcasting	137.2	136.8	0.3	158.4	86.6	KXAS, NBC, Dallas	118,202	(5.5)
19	20	Univision Holdings	136.3	121.5	12.2	136.3	100.0	KMEX, IND, Los Angeles	76,803	10.0
20	21	Multimedia Inc.	125.9	120.8	4.2	374.0	33.7	KSDK, NBC, St. Louis	117,711	4.7
21	19	Great American Communications	123.7	126.1	(1.9)	200.4	61.7	KTSP, CBS, Phoenix, Ariz.	72,023	12.8
22	22	Meredith Corp.	109.6	119.8	(8.5)	474.7	23.1	KCTV, CBS, Kansas City	56,997	1.0
23	23	Times Mirror Co.	99.0	110.1	(10.1)	2,677.9	3.7	KDFW, CBS, Dallas	141,510	13.1
24	25	McGraw-Hill	96.1	89.7	7.1	509.8	18.9	WRTV, ABC, Indianapolis	63,175	(16.9)
25	24	Chronicle Publishing Co.	96.0	90.0	6.7	384.0	25.0	KRON, NBC, San Francisco	143,020	9.4
26	26	Pulitzer Publishing Co.	92.7	84.8	9.3	391.0	23.7	WYFF, NBC, Greenville-Spartanburg	59,323	(3.7)
27	27	Viacom International	79.9	78.1	2.3	1,113.8	7.2	KMOV, CBS, St. Louis	89,376	2.8
28	29	Freedom Newspapers	79.0	67.0	17.9	432.0	18.3	WLNE, CBS, Providence, R.I.	23,079	(1.2)
29	28	Bonneville International Corp.	76.0	68.8	10.5	154.1	49.3	KIRO, CBS, Seattle-Tacoma	90,287	17.0
30	30	Lee Enterprises	67.9	62.8	8.1	234.8	28.9	KOIN, CBS, Portland, Ore.	57,547	6.6
31	32	Media General	61.8	60.0	3.0	449.4	13.8	WJKS, ABC, Jacksonville, Fla.	15,995	(34.9)
32	35	Dispatch Printing Co.	59.4	37.2	59.7	204.4	29.1	WBNS, CBS, Columbus, Ohio	56,609	(2.3)
33	34	New York Times Co.	56.4	54.7	3.1	1,700.1	3.3	WREG, CBS, Memphis	55,703	(3.5)
34	37	Journal Communications	38.8	36.2	7.3	274.9	14.1	WTMJ, NBC, Milwaukee	58,527	9.6
35	36	Park Communications	35.8	36.6	(2.2)	149.6	23.9	WTVR, CBS, Richmond	38,665	(8.3)
36	31	Providence Journal Co.	32.0	62.0	(48.4)	243.0	13.2	WHAS, CBS, Louisville	52,692	1.5
37	38	Macromedia Inc.	26.3	25.4	3.5	173.4	15.2	WOWK, CBS, Charleston, W. Va.	31,439	(5.3)
38	33	Harte-Hanks Communications	26.0	58.4	(55.5)	462.7	5.6	KENS, CBS, San Antonio	50,537	19.5
39	39	Landmark Communications	23.2	22.5	3.1	363.6	6.4	KLAS, CBS, Las Vegas	23,355	19.4
40	40	Howard Publications	20.0	22.0	(9.1)	190.0	10.5	WIVB, CBS, Buffalo*	45,265	(5.1)
41	41	Blade Communications	16.2	15.1	7.3	25.2	7.2	WDRB, IND, Louisville	16,335	24.6
42	42	Donrey Media Group	9.6	10.8	(11.1)	300.0	3.2	KOLO, ABC, Reno, Nev.	NA	NA
		TOTALS	15,192.3	14,296.4	6.3	38,201.6	39.8		5,054,509	(2.4)

Notes: Dollars are in millions. Rankings given for 1987 in this table are based on figures restated or estimated, some of which are pro forma. Only companies among the 100 leading media companies are ranked in this table. *Sold. **Sources:** TV revenues are Advertising Age estimates. Average households from A.C. Nielsen, Feb. 1989 ratings and number of households. Percent change on households from Feb. 1988 figures, not shown.

Media companies ranked by radio revenue

Rank 1988	Rank 1987	Company	Radio revenue 1988	Radio revenue 1987	% chg	All media revenue 1988	Radio revenue % all media	*Top radio station by revenue* Station, location	Revenue 1988	'88-'87 % chg
1	1	Capital Cities/ABC	$202.2	$184.3	9.7	$4,588.5	4.4	KABC, AM, Los Angeles	$33.0	37.5
2	2	CBS Inc.	184.7	150.4	9.5	2,776.8	5.9	KMOX, AM, St. Louis	20.5	11.4
3	3	Westinghouse Electric Corp.	111.6	100.0	11.6	632.8	17.6	WINS, AM, New York	22.5	(2.2)
4	4	Gannett Co.	85.0	79.4	7.1	3,211.3	2.6	KIIS, AM/FM, Los Angeles	29.0	0.0
5	7	Cox Enterprises	80.8	61.2	32.0	1,578.2	5.1	KOST, FM, Los Angeles	23.0	27.8
6	5	Bonneville International Corp.	78.1	68.9	13.4	154.1	50.7	KIRO, FM, Seattle	18.2	1.1
7	6	Great American Communications	76.7	64.2	19.5	200.4	38.3	WKLS, FM, Atlanta	11.5	15.0
8	8	Viacom International	61.3	54.0	13.5	1,113.8	5.5	WLTW, FM, New York	19.3	9.0
9	9	Tribune Co.	45.2	43.8	3.2	1,985.5	2.3	WGN, AM, Chicago	33.3	7.4
10	11	Hearst Corp.	28.3	25.2	12.3	1,986.0	1.4	WBAL, FM, Baltimore	9.6	31.5
11	10	Park Communications	26.5	25.3	4.7	149.6	17.7	WTVR, AM/FM, Richmond, Va.	1.5	(16.7)
12	12	Scripps Howard	16.9	15.9	6.3	1,203.3	1.4	WBSB, FM, Baltimore	9.0	0.0
13	15	Journal Communications	13.9	12.1	14.4	274.9	5.0	WTMJ, AM, Milwaukee	9.0	42.9
14	14	Pulitzer Publishing Co.	11.1	12.5	(11.2)	391.0	2.8	KTAR, AM, Phoenix	8.0	(8.0)
15	13	Multimedia Inc.	11.0	12.9	(14.7)	374.0	2.9	WFBC, AM/FM, Greenville, S.C.	4.5	(18.2)
16	16	Oklahoma Publishing Co.	7.1	7.4	(4.1)	374.0	1.9	WSM, AM/FM, Nashville	6.2	(4.6)
17	17	New York Times Co.	6.1	5.8	5.2	1,700.1	0.4	WQXR, AM/FM, New York	6.1	5.2
18	18	Landmark Communications	4.7	4.3	9.3	363.6	1.3	WLTY, FM, Norfolk, Va.	3.2	23.1
19	19	Dispatch Printing Co.	2.9	2.8	3.6	204.4	1.4	WBNS, AM/FM, Columbus, Ohio	2.9	3.6
20	20	H&C Communications	2.5	2.5	0.0	140.0	1.8	KPRC, AM, Houston	2.5	0.0
21	21	Crain Communications	0.4	0.3	33.3	137.2	0.3	WWUS, FM, Key West, Fla.	0.4	33.3
		TOTALS	1,037.0	933.2	11.1	23,539.5	4.4		273.2	9.5

Notes: Dollars are in millions. Rankings given for 1987 in this table are based on figures restated or estimated, some of which are pro forma. Only companies among the 100 leading media companies are ranked in this table. **Sources:** Radiorevenues are Advertising Age estimates. Station revenues from Jim Duncan Jr., Duncans Radio Market Guide, 1989 and 1988 editions. Percent change on revenue from 1987 figures, not shown.

Buying binges pump up magazine gains

Crossing the $10 billion mark, medium proves attractive target for expansion-minded

Revenues for the 36 media companies with magazine operations, bolstered by acquisitions and strong ad growth, saw total net revenues from magazines grow 13% to $10.3 billion in 1988.

And in '89, the buying frenzy continues. Category leader Time Inc. and No. 30 Warner Communications are trying to preserve their independence, much less their merger pact, in the face of hostile takeover attempts by Paramount Communications and others.

The biggest movement among the magazine companies last year came from Rupert Murdoch's News Corp. which pushed its magazine total to $509.6 million, up 74.6% largely by acquiring Triangle Publications and bringing *TV Guide* and *Seventeen* into the fold. Even with full reporting for Triangle in both years (it does not appear in News Corp.'s fiscal '88 totals), growth of the magazine operations would compare favorably with advertising returns in 1988 for the nation's leading consumer publications monitored by Publishers Information Bureau.

PIB reported 1988 ad revenue from its 166-member consumer magazines up 8.7% to $5.94 billion, which exceeds the 5.5% gain in 1987. The year-to-year increase was the largest since 1984. Cosmetics and toiletries provided the greatest growth of 21.5%, while the auto category grew by 17%.

The magazine industry was further buoyed by first quarter 1989 growth of 9.5% to $1.58 billion as eight of the top 10 advertising categories showed above average growth, according to PIB. Business services, food & food products and cigarettes & tobacco ad categories each recorded $100 million-plus in total advertising as each grew by at least 17%. Automotive magazines' biggest ad supporter increased only 2.1% to $217 million, thereby keeping the lid on double-digit growth.

Other acquisitions helped stimulate year-to-year growth totals for the 36. Cahners Publishing Co. was up 23.5% after adding numerous titles, including consumer-oriented *Modern Bride* in 1987. The ever title-hungry Cahners, part of U.K.-based Reed International group, earlier this year purchased four medical publications from Hospital Publications, Secaucus, N.J., for $20 million-to-$30 million. This May, Reed paid News Corp Ltd. $825 million for travel-related operations that include *Travel Weekly* and six other travel trade publications.

Automotive, magazines' big ad supporter, grew only 2.1% to $217 million, keeping a lid on double-digit growth in first quarter

Times Mirror magazine division revenues jumped 47% to $298.5 million, largely on the basis of its acquisition of four consumer magazines from Diamandis Communications in December 1987—*Field & Stream*, *Home Mechanix*, *Skiing* and *Yachting*. In October, 1988, Times Mirror bought *Military Forum*, circulated to 27,000 senior Department of Defense officials.

Ziff Communications, deriving all of its $200 million in revenues from magazines, grew by 37.9% based on the strength of its computer publications. Ziff's top three ad gainers show a concentration of power and growth: *PC Magazine* grew 35.5% in gross ad dollars to $105.5 million, *PC Week* expanded 4.2% to $75.[illegible] million, and *MacUser* vaulted 91.[illegible] to $22.8 million in 1988, according to the "Gallagher Report."

The New York Times Co. reported magazine revenues of $249.1 million, up 10.2%. It was involved in one of the bigger magazine acquisitions in May 1989 when it surprised the industry by snatching away *McCall's* from the grasp of Diamandis Communications. The division's totals are for the calendar year and do not include *McCall's*, formerly owned by Working Woman/McCall's Group. The group fetched $80 million for its leading women's magazine.

The deal sharpened the two-tier focus among the big circulation books in women's service: Hearst Corp. with *GH* and *Redbook*, Meredith Corp. with *Better Homes & Gardens* and *Ladies' Home Journal*, and now New York Times Magazines with *Family Circle* and *McCall's*.

The strong revenue growth in the aggregate, however, covers up some low-growth numbers turned in by many operations. Hearst Corp. advanced only 5.3% to an estimated $919 million in magazine revenues as its lead publication, *Good Housekeeping*, declined 2.4% to $129.3 million in gross ad revenue. Capital Cities/ABC magazine totals declined 1.3% to $370 million, while Edgell Communications grew 3.3%, Maclean Hunter Ltd. 3.1% and the Washington Post 1.6%, the latter affected by *Newsweek*'s 1% growth in gross ad revenue to $241.7 million. □

Biggest magazine deals by leading media cos.

Property	Buyer	Seller	Price
Triangle Publications	News Corp.	Triangle Publications	$3,200.0
Travel trade division*	Reed International (parent of Cahners)	News Corp.	825.0
Whittle Communications (50%)	Time Inc.	Whittle Communications	185.0
McCall's	New York Times Co.	Working Women/McCalls Group	80.0

Notes: Dollars are in millions. *Seven trade publications including *Travel Weekly*.

Media companies ranked by magazine revenue

Rank 1988	Rank 1987	Company	Magazine revenue 1988	Magazine revenue 1987	Magazine revenue % chg	All media revenue 1988	Magazine revenue % all media	Top magazine by gross ad revenue: Magazine	Ad revenue 1988	'88-'87 % chg
1	1	Time Inc.	$1,752.0	$1,621.0	8.1	$3,686.0	47.5	*Time*	$349.7	6.4
2	2	Hearst Corp.	919.0	873.0	5.3	1,986.0	46.3	*Good Housekeeping*	129.3	(2.4)
3	3	Advance Publications	745.0	678.0	9.9	2,655.5	28.1	*Parade*	266.5	19.2
4	5	Reader's Digest Assn.	600.4	522.2	15.0	600.4	100.0	*Reader's Digest*	114.0	6.3
5	4	Thomson Corp.	596.0	528.0	12.9	1,126.0	52.9	*Medical Economics*	25.3	3.3
6	13	News Corp.	509.6	332.8	53.1	1,683.3	30.3	*TV Guide*	335.4	1.3
7	8	Cahners Publishing Co.	420.0	340.0	23.5	420.0	100.0	*Restaurants & Institutions*	39.7	(0.5)
8	6	McGraw-Hill	413.7	377.0	9.7	509.8	81.1	*Business Week*	227.3	4.5
9	7	Capital Cities/ABC	370.0	374.8	(1.3)	4,588.5	8.1	*W*	27.1	30.9
10	11	Hachette Group	366.0	321.0	14.0	366.0	100.0	*Woman's Day*	115.6	0.1
11	9	Meredith Corp.	365.1	329.4	10.8	474.7	76.9	*Better Homes & Gardens*	152.8	7.5
12	12	International Data Group	352.0	300.0	17.3	352.0	100.0	*Computerworld*	5.7	9.2
13	10	Washington Post Co.	327.5	322.2	1.6	1,305.6	25.1	*Newsweek*	241.7	1.0
14	16	Times Mirror Co.	298.5	203.1	47.0	2,677.9	11.1	*Field & Stream*	36.9	(3.9)
15	14	New York Times Co.	249.1	226.1	10.2	1,700.1	14.7	*Family Circle*	134.4	8.4
16	15	National Geographic Society	245.4	223.4	9.8	245.4	100.0	*National Geographic*	35.7	24.1
17	19	Ziff Communications	200.0	145.0	37.9	200.0	100.0	*PC*	105.5	35.3
18	17	Petersen Publishing Co.	186.7	162.4	15.0	186.7	100.0	*Motor Trend*	27.2	9.5
19	18	Forbes Inc.	175.0	160.0	9.4	181.4	96.5	*Forbes*	128.7	0.1
20	21	General Media International	150.0	139.7	7.4	150.0	100.0	*Penthouse*	20.0	4.1
21	20	Edgell Communications	148.3	143.5	3.3	148.3	100.0	*Hotel & Motel Management*	8.5	8.5
22	23	U.S. News & World Report	141.8	124.2	14.2	141.8	100.0	*U.S. News & World Report*	128.1	20.7
23	22	Crain Communications	136.8	127.7	7.1	137.2	99.7	*Advertising Age*	26.9	0.4
24	24	Playboy Enterprises	120.4	115.7	4.1	143.8	83.7	*Playboy*	40.7	8.2
25	NA	Whittle Communications	96.6	67.4	43.3	152.0	63.6	*Special Reports*	40.0	NA
26	25	Maclean Hunter	70.6	67.9	3.1	181.1	38.7	*Progessive Grocer*	12.6	7.1
27	28	Affiliated Publications	62.0	30.9	100.6	506.5	12.2	*Billboard*	NA	NA
28	36	Macfadden Holdings	45.0	NA	NA	209.0	21.5	*True Story*	9.6	1.1
29	29	Cowles Media Co.	42.0	28.0	50.0	315.0	13.3	*Folio*	NA	NA
30	27	Warner Communications	40.6	38.0	5.3	496.4	8.1	*DC Comics*	NA	NA
31	26	Dow Jones & Co.	36.0	39.0	(7.7)	973.1	3.7	*Barron's*	33.0	0.4
32	30	Times Publishing Co.	24.9	22.8	9.2	194.0	12.8	*Florida Trend*	3.8	(5.0)
33	31	LIN Broadcasting	21.2	19.4	9.5	158.4	13.4	*GuestInformant*	21.2	9.5
34	32	CMP Publications	20.0	16.2	23.5	133.0	15.0	*InformationWEEK*	13.5	17.4
35	33	Media General	13.5	15.9	(15.1)	449.4	3.0	*Consultant*	4.3	16.2
36	34	Dispatch Printing Co.	2.1	3.5	(40.0)	204.4	1.0	*Ohio Magazine*	NA	NA
		TOTAL	10,261.6	9,039.1	13.5	29,638.7	34.6		2,911.7	8.2

Notes: Dollars are in millions. Rankings given for 1987 in this table are based on figures restated or estimated in 1988, some of which are pro forma. Only companies among the 100 leading media companies are included in this ranking. **Sources:** Newspaper revenues are Advertising Age estimates. Ad revenue from Publishers Information Bureau. Percent change computed on ad revenue from 1987 figures, not shown. AA chart: Kevin Brown

Companies

(Continued from Page S-1)

nues to 47.9% from 50.5%. Overall sales at General Electric ($50.1 billion) and Berkshire Hathaway ($2.3 billion) skew an analysis of public companies and have been omitted from the analysis of public companies here. This is because non-media accounts for 92.7% of GE's net revenue and 94.4% at Berkshire Hathaway.

Among the remaining 47 public media companies, their return on total sales (media and non-media) edged slightly upward to 8.5% from 8.1% in 1987 as net income rose 15.9% to $7.09 billion on net revenues of $83.9 billion, up 11.5%. *(See chart on Page S-24)* Given media's decline as a percentage of total sales and its lower year-to-year revenue increase than non-media, the greater returns appear to be coming from the non-media operations.

Compared to industry as a whole, media companies are performing handsomely. Among AD AGE's 100 Leading National Advertisers the aggregate return on sales was only 2.5% last year.

Media concentration among the public companies was dominated by newspapers, numbering 20 companies, followed by cable with 11 and TV with seven. As expected, cable's performance put a damper on composite totals. Five of the cable companies had negative sales, largely because of acquisition expenses charged to earnings. Cable alone had a 3.5% return on income, down from 3.7% in the prior year.

LIN Broadcasting again reported a strong 36.4% return on sales, exceeded only by CBS Inc.'s 41.4%. However, CBS included income generated from the sale of its records group in its net income total of $1.15 billion, up from $452.5 million in 1987. TVX, pending acquisition by Paramount Communications, trailed the rest with a return on sales of minus 54.4%.

Several private media companies on this year's Top 100 list are testing public waters. Reader's Digest and Central Newspapers announced plans this June to establish a public market for their stock. Both report that placing a value on the stock will enable shareholders, primarily those with non-voting stock, to dispose of their holdings. Over the years, each has distributed non-voting shares to foundations, pubic institutions and the like. □

Outdoor paces 'other media' segment

Media is like squash, it comes in every size, color, shape and taste.

And it will continue to proliferate like this basic garden variety as long as marketers and information mongers continue to invent new ways to capture the public interest.

Given the fracturing and splintering of "traditional" media — newspapers, magazines, TV and such — pinning a definition on media is slippery. Defying categorization are electronic library data-base suppliers, TV catalogers, telemarketing networks, electronic signage marketers and even fax papers. With the exception of electronic retailers, most have not reached the revenue magnitude to compete for space on the Top 100 Media chart.

For the 100 Leading Media issue, Advertising Age sought to hold to the traditional idea of media as gathering news and information, packaging it and distributing it to subscribers, paid or free. This generally meant newspapers, magazines, TV, radio and cable; the five big division breakouts reported in this issue. "Other media" were dominated by outdoor, free-standing insert operations and wire services.

Outdoor accounted for $963.4 million in revenues among seven media companies, up about 12% from the prior year. The leader remained 3M at $249.6 million, up 15%. Valassis Inserts retained its lead among FSI companies with $400 million in revenues, same as in '87. News Corp., which bought two FSI companies in last year's ranking — Quad/Graphics and Product Movers — reported $358 million for them in partial-year revenues.

Tangential to the FSI business are circulars and shared-mail programs of ADVO-System, which added $589 million in revenues to "other media," a 13.2% growth credited largely to price increases. Revenue growth couldn't offset a 24% hike in third-class postage rates that sent earnings into the loss column.

Between them, the two big wire services — Associated Press and Reuters Holdings — contributed $612.6 million to the "other media" category, up 14.9% from the prior year. Excluded from "other media" were data-base activities, motion pictures, theater chains, syndication, contract printing and book publishing.

Electronic "shopping" companies are among the fastest growing businesses using broadcast and cable, but they were excluded from the rankings because their revenues are retail sales.

Yellow Pages, which fit the media criteria, remains a black hole because CFOs and controllers are tight-lipped about the revenue stream. Although there is less noise in the numbers reported by Yellow Page operators this year, there is still some clutter. Rather than merge the R.H. Donnelleys and the Baby Bells into the Top 100 Media chart, Yellow Pages were kept separate *(See Page S-13).* ❑

Methodology

Companies on the Top 100 Media chart, whether U.S. or foreign based, were ranked by net revenues generated by their U.S. media properties. Net revenues exclude agency commission on the ad side and such items as provisions for newsstand returns, unpaid subscriptions and subscription agency commissions on the circulation side.

Figures used were either calendar or the latest available fiscal returns. In the case of mergers, figures representing a pro forma reading of the merged company were used if the company could provide them. A pro forma reading was accepted for United Artists Entertainment, a merger of United Cable Television Corp. and United Artists Communications. The revenue total was reported in public filings with the SEC.

Prior-year figures for the Top 100 Media companies often were restated to reflect current operations. To prevent this from affecting a company's prior-year ranking, the ranking used in last year's issue was retained.

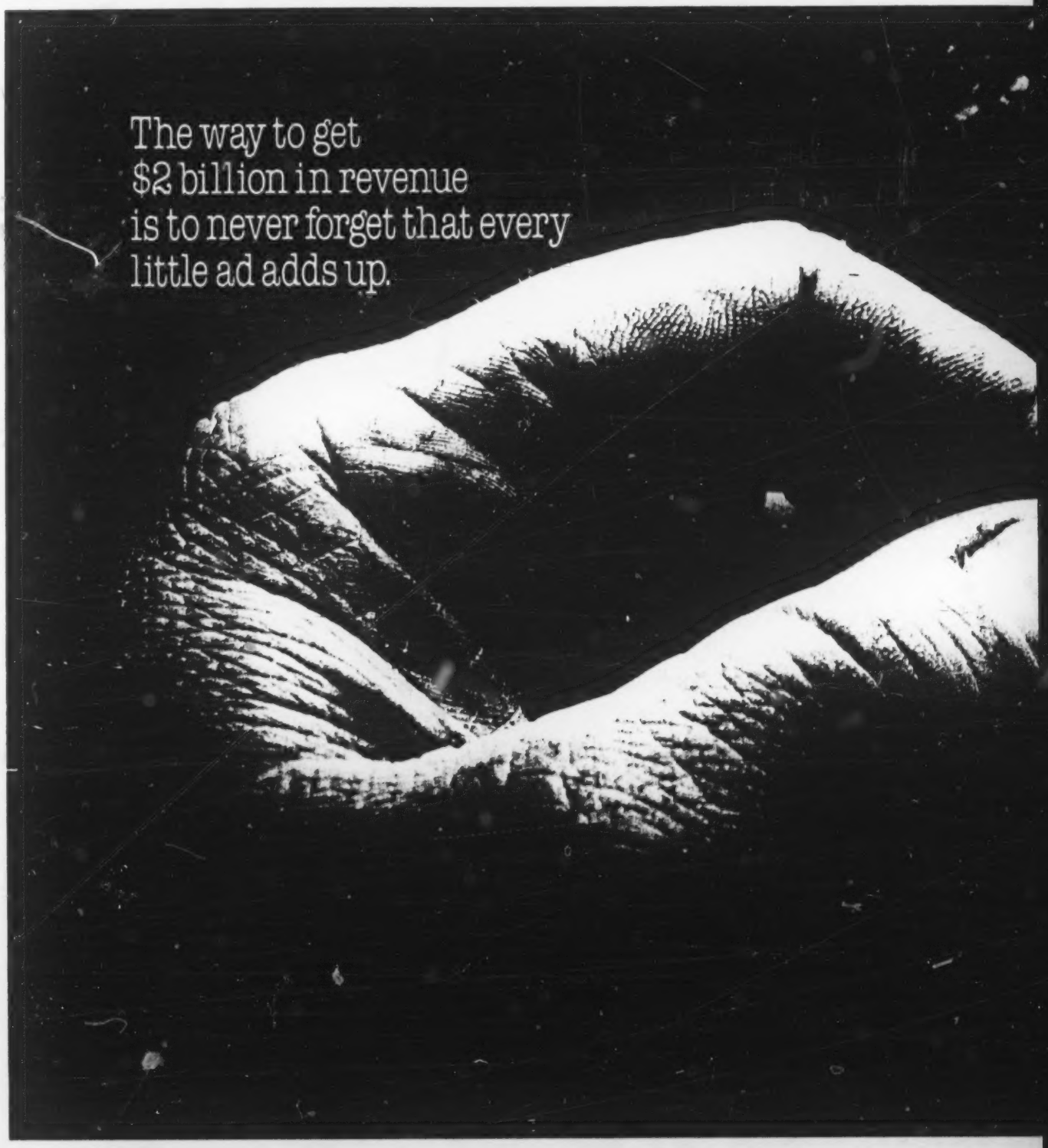
With more than half the companies private, estimates often were required. Where made, either by Ad Age or by secondary sources, the estimates were run by the company for comment. To assist Ad Age in this project, however, most private companies were forthcoming with their total revenues and media category breakouts. ❑

Premium Channels Publishing Co., Inc.

In one month, TV BLUEPRINT hits more homes than Major Leaguers have hit home runs since baseball began!

1263 Sunrise Highway
Bay Shore, NY 11706
(516) 665-8800

The way to get $2 billion in revenue is to never forget that every little ad adds up.



KNIGHT-

Knight Ridder, which recorded its thirteenth year of earnings per share growth in 1988, is a worldwide

Yellow Pages ring up $7 billion-plus in revenues

Rochester package helps GTE vault ahead of Bellsouth as industry leader

Top 10 Yellow Pages cos. in 1988

Rank	Company	Yellow Pages revenue	Total rev
1	GTE	$1,300 0	$16,460 0
2	Bellsouth	1,000 0	13,596 9
3	Bell Atlantic	830 0	10,880 1
4	Pacific Telesis, Pacific Bell Directory	789 0	9,483 0
5	Southwestern Bell	722 7	8,452 7
6	U S West	700 0	9,220 6
7	Ameritech	495 2	9,903 3
8	Dun & Bradstreet, R H Donnelley	442 0	4,267 4
9	United Telecom	183 0	6,493 0
10	Nynex	NA	12,660 8

Notes: Dollars are in millions. Yellow Pages revenue per company includes the following: 1 GTE directory revenues, 2 Total directory revenues including white pages, 3 Total directory operations revenues, 4 Directory advertising only, 5 Various directories, including Yellow Pages and white pages, 6 U S West Marketing Resources Group, U S West Direct, Trans Western Publishing, U S Marketing Resources Co , MM Plus Inc , 7 Estimated directory revenues, 8 Total publishing revenues from Donnelley Directory, Donnelley Information Publishing and Donnelley Information Technology, 9 Directories America, 10 Not available **Source:** Ad Age

BY JILL L. SHERER

Telephone companies are not only in the business of Talking Yellow Pages, but talking up the power and reach of the Yellow Pages medium, the fourth largest in the country, as directory revenues continue to rise.

The Yellow Pages Publishers Association, a Troy, Mich.-based group that represents publishers that produce more than 96% of all U.S. Yellow Pages directories and generate almost 99% of the medium's revenue, touts that Yellow Pages advertising reached $7.8 billion, up 6.8% from last year. These numbers, however, include advertising in white pages.

A purer figure for Yellow Page revenues would be $7.2 billion in 1988, up 7.5% from the previous year, says a spokesman from Communications Trends, Larchmont, N.Y., who predicts the industry will grow 7% to $7.7 billion in 1989.

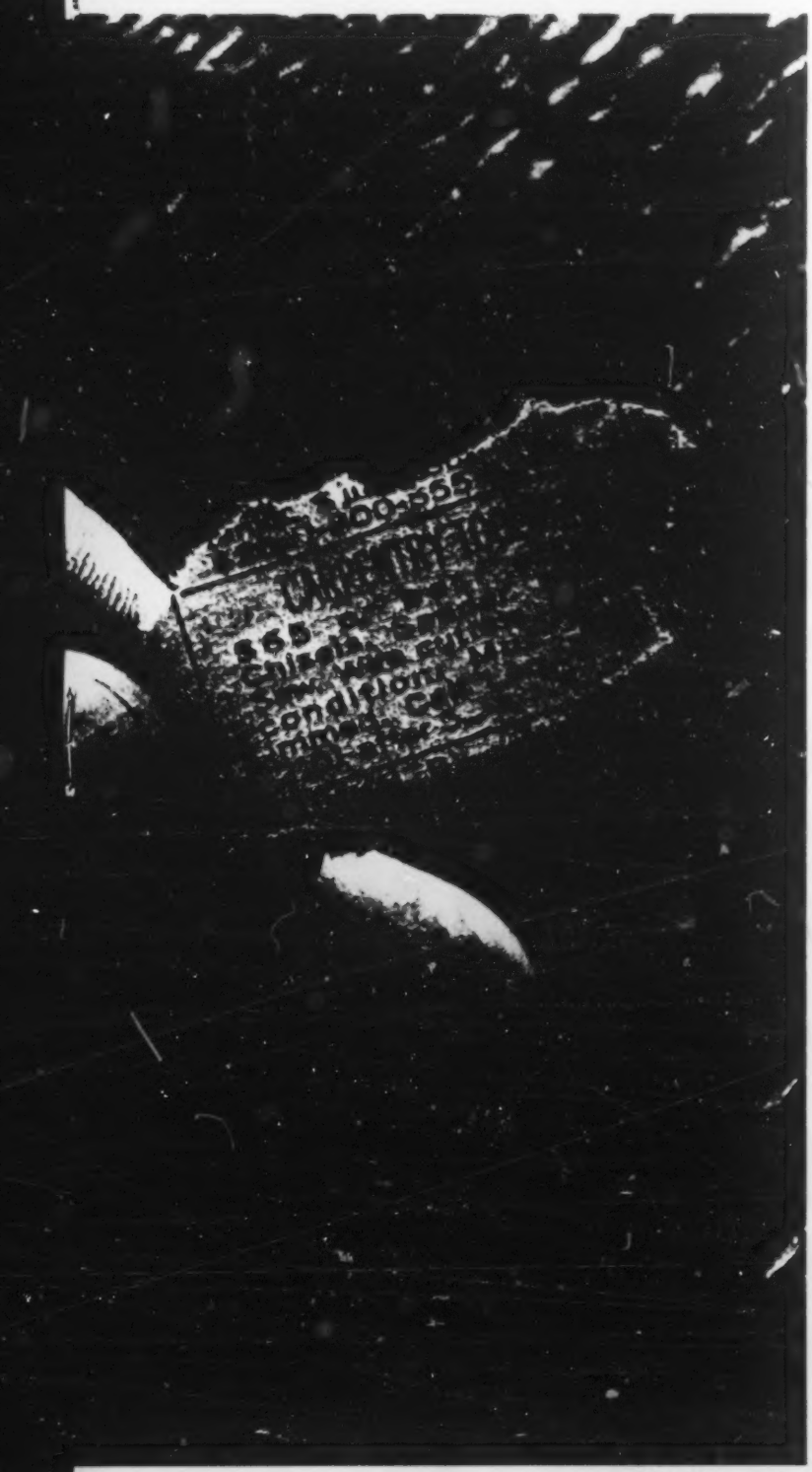
With Yellow Pages revenues totalling $1.3 billion, GTE passed Bellsouth—at $1 billion—as the industry leader in 1988. Bellsouth's total revenue count remained flat between the two years as GTE's operation soared from $860 million in 1987.

Part of GTE's approximate 51% increase from the prior year can be attributed to a $194 million contract it signed in 1988 with Rochester Telephone to provide directory advertising sales and publishing services over five years.

Another contributing factor is GTE's successful operations in publishing more than 1,000 directories and sales of Yellow Pages advertising in the U.S. and abroad.

Bell Atlantic retained the No. 3 ranking, with an $830 million company estimate that is relatively free of non-Yellow Pages revenue.

Nynex, on of the biggest Baby Bell publishers, would not break out its revenue figures, but industry experts believe it continues to rank in the top five. Ad Age placed it at the bottom of the ranking for lack of a figure. [ ]



Pressroom Foreman Hayvard Brantley wanted readers of The Bradenton (Fla.) Herald to see red. But a local car dealer had ordered yellow ink for the prices in his ad. Brantley saw that the ad was impossible to read, and changed the color. Two other area papers, never questioning the dealer's instructions, ran the ad in illegible yellow. The car dealer called Knight-Ridder's Bradenton Herald to say, "Thanks for thinking of me."

In St. Paul a businessman howled. His small ad for copier machines appeared right next to a much larger ad for another copier company in the Business/Twin Cities section of the St. Paul Pioneer Press Dispatch. When Vice President and Advertising Director Tom Golden heard about the mix-up, he offered to run the ad again free in the next Sunday edition. The Pioneer Press Dispatch gained a satisfied – and now frequent – advertiser.

Night Composing Supervisor Tammy Register called the publisher of The (Milledgeville, Ga.) Union-Recorder at home late one night. She wanted to stop the presses. No exclusive story or cataclysmic news event: An ad was incorrect. Not only did Publisher Roger Coover say, "Stop the presses," but he immediately drove to the paper to thank Tammy for watching out for a customer.

These examples might appear small, but they underscore Knight-Ridder's unending quest to satisfy our customers at our daily newspapers and our worldwide business information services.

The message is not new. We've always believed in outstanding service and editorial excellence.

But the world is changing. It's becoming increasingly competitive. To meet this challenge, we are determined to be even more fiercely attentive to the needs of our customers.

Knight-Ridder. With over $2 billion in total revenue. Reaching more than 100 million people every day in 89 countries. Never forgetting that every reader, every advertiser and every subscriber counts. And every little ad adds up.

KR

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Companies with cable channels

Parent	Channel	Subscribers 1988	1987
Capital Cities/ABC*	ESPN	50.0	45.2
General Electric	CBNC	NA	NA
Landmark Communications	Weather Channel	38.0	32.0
Oklahoma Publishing Co.	Nashville Network	43.0	37.0
Playboy Enterprises	Playboy Channel	0.5	0.5
Time Inc.	Cinemax	6.0	5.1
	HBO	17.0	15.1
Turner Broadcasting	CNN	48.4	42.9
	Headline News	34.2	29.2
	SuperStation TBS	47.0	42.5
	TNT	23.0	NA
Viacom	Showtime	9.7	8.4
	The Movie Channel	2.6	2.9
Viacom (MTV Networks)	MTV:Music Television	44.2	37.7
	Nickelodeon	43.3	36.8
	Nick-at-Nite	39.6	31.8
	VH-1	29.6	24.4
Viacom**	Lifetime	42.0	35.4

Notes: Subscribers are in millions. Only companies among the 100 leading media companies are listed. * Capital Cities/ABC owns 80% of ESPN. ** Viacom owns 33.3% of Lifetime. **Source**: Cabletelevision Advertising Bureau, Cable TV Fact Book, 1989 edition.

Media's fastest-rising star —cable—soars 23.9%

Growing standbys, new players build category

Cable provided the largest number of new entries to AD AGE's Top 100 Media Companies' list and kept far ahead of other media categories in revenue growth—up 23.9% to $11.5 billion.

New entries to this year's list include Adelphia Communications, Cablevision Industries, Century Communications Corp., Houston Industries and United Artists Entertainment, a combination of United Artists Communications and United Cable Television Corp., last year's No. 64.

The new entries emerge largely through acquisition, but none could match the dollar volume of purchases made by Tele-Communications Inc., whose revenues of $1.7 billion, up 39.2%, actually belie its power.

TCI owns pieces of three other cable companies on the list of 36 and is in joint ventures with many others. These associations do not show up in TCI revenues, either because of minority ownership or buyouts dated after its year closed.

TCI in 1988 bought up the remaining 50% of Western Telecommunications (now WestMarc), purchased a 42% share in Storer Holdings and this year has taken a 52% position in the UAE merger.

The cable powerhouse's 1988 investments amounted to $1.5 billion, while last month's UAE merger cost TCI about $1.4 billion, including a $288 million investment in United Cable earlier in 1988.

TCI retained its lead in total basic subscribers among MSOs with 5.98 million—far ahead of Time Inc.'s ATC Corp. at 3.9 million.

Competition for cable properties has pushed up bidding prices to as high as $2,400 per subscriber—the price paid for the U.S. cable properties of Rogers Communications, No. 94 among last year's Top 100. Prices were about $900 per subscriber only five years ago.

The acquisition activity has extended beyond cable companies as well. In April 1989, Pacific Telesis announced it would buy into Group W's cable TV properties in Chicago, making PacTel the first Baby Bell to crack the cable industry. That same month, the FCC gave General Telephone Co. of California permission to build a cable TV system in a Los Angeles suburb. With prices going up, several media companies saw fit to bail out of cable. Harte-Hanks Communications, Hearst Corp. and New York Times Co. either left or announced plans to do so.

Cooke Media Group was on the verge this March of selling Cooke Cablevision systems for $1.5 billion to a consortium of seven operators. Though that deal fell through, Cooke has since asked another broker to sell the MSO.

While cable revenues continue to be derived largely through basic and pay subscription, cable is developing into an advertising powerhouse.

In 1988, cable grabbed $1.19 billion of the advertising pie, up 23.6% from 1987. Cable networks contributed 79% or $942 million of that total.

First quarter cable ad growth in 1989 is even more promising. Cable networks brought in $308.7 million in advertising, up 40.5% from the same period in the previous year. Many of these ad dollars are being diverted from broadcast networks. Cable penetration of U.S. households hit 55% in '88. Of that number, studies show, basic and pay cable combined pull 36% of viewing time, slightly more than network TV among cable households.

There continues to be room for innovation in the medium. Whittle Communications found advertiser support in tests for its "Channel One," a news program for high schools containing commercials. Despite opposition from some quarters, Whittle plans to launch the program nationwide.

The "Channel One" services, however, spawned challengers. Ted Turner's Cable News Network will launch its own commercial-free newscast to secondary schools this August, and The Discovery Channel will introduce commercial-free documentary programs.

Cable's versatility also is creating a new industry subgroup: Pay-per-view TV now accounts for an estimated 2% of industry revenues. Viacom International in late 1988 created Showtime Event Television to distribute special-event programming to PPV companies. □

Biggest cable deals by leading media cos.

Property	Buyer	Seller	Price
United Cable/United Artists	merged companies	NA	$1,600.0
Storer Communications	Comcast 50%, TCI/Knight-Ridder jv 50%	KKR	1,540.0
Centel Cable Television	six-company consortium	Centel Corp	1,400.0
Rogers Cablesystems	Houston Industries	Rogers Communications	1,265.0
Long Island, Cleveland cable	Cablevision Systems	Viacom	550.0
Selkirk Communications (only U.S. property is Ft. Lauderdale cable)	Maclean Hunter Ltd.	Selkirk	475.0
Adams-Russell Co.	Cablevision Systems	Adams-Russell Co.	463.8
NYT Cable TV	Comcast, Lenfest Communications	New York Times Co.	420.0
Continental Cablevision (17%)	Amon Hostetter, Continental ceo	Dow Jones & Co.	299.8
Daniels & Associates (pending)	United Artists (now UAE)	Daniels & Associates	256.4
Comcast Cablevision of Maryland	Comcast Corp.	limited partnership	210.0
Memphis CATV Inc. (49%)	Time Inc.'s ATC	MCI	148.0
ACT 1 Cable	United Artists (now UAE)	NA	128.0

Notes: Dollars are in millions.

Media companies ranked by cable revenue

Rank 1988	Rank 1987	Company	Cable revenue 1988	Cable revenue 1987	% chg	All media revenue 1988	Cable revenue % all media	*MSO property (if applicable)* Cable	Basic subscribers	Count date
1	1	Time Inc.	$1,934.0	$1,685.0	14.8	$3,686.0	52.5	ATC Corp.	3,900,000	12/88
2	2	TCI	1,705.1	1,225.1	39.2	1,705.1	100.0	TCI	5,977,790	12/88
3	3	Viacom International	972.6	806.4	20.6	1,113.8	87.3	Viacom Cablevision	1,114,500	12/88
4	4	Continental Cablevision	622.0	442.0	40.7	622.0	100.0	Continental Cablevision	2,302,000	12/88
5	5	Turner Broadcasting System	537.6	436.4	23.2	537.6	100.0			
6	6	United Artists Entertainment Co.	513.6	431.6	19.0	513.6	100.0	UAE	1,339,729	10/88
7	10	Cablevision Systems Corp.	493.5	299.5	64.8	493.5	100.0	Cablevision Systems Corp.	1,140,014	11/88
8	8	Storer Holdings	472.1	419.8	12.5	472.1	100.0	SCI Holdings	1,516,623	12/88
9	7	Cox Enterprises	471.8	425.0	11.0	1,578.2	29.9	Cox Cable Communications	1,465,245	12/88
10	9	Warner Communications	456.4	387.0	17.9	496.4	91.9	Warner Cable	1,488,720	12/88
11	11	Comcast Corp.	404.1	286.8	40.9	404.1	100.0	Comcast Cable Communications	1,410,000	12/88
12	12	Times Mirror Co.	282.7	239.8	17.9	2,677.9	10.6	Times Mirror Cable Television	992,000	12/88
13	13	Capital Cities/ABC	241.1	220.7	9.2	4,588.5	5.3			
14	14	Advance Publications	229.4	203.0	13.0	2,655.5	8.6	Newhouse Broadcasting	1,123,634	12/88
15	15	Sammons Communications	215.8	201.7	7.0	215.8	100.0	Sammons Communications	853,868	12/88
16	19	Adelphia Communications	185.0	131.4	40.8	185.0	100.0	Adelphia Communications	682,000	12/88
17	16	TeleCable Corp.	180.0	157.0	14.6	180.0	100.0	TeleCable Corp.	560,000	12/88
18	18	Cooke Media Group	177.0	139.0	27.3	287.0	61.7	Cooke Cablevision	692,790	12/88
19	20	Cablevision Industries Corp.	170.2	130.5	30.4	170.2	100.0	Cablevision Industries	600,870	11/88
20	17	Houston Industries	162.9	142.6	14.2	162.9	100.0	KBLCOM (formerly Rogers)	529,708	12/87
21	22	Century Communications	160.0	106.0	50.9	160.0	100.0	Century Cable	774,439	12/88
22	21	Scripps Howard	149.5	112.1	33.4	1,203.3	12.4	Scripps Howard	501,000	12/88
23	23	Washington Post Co.	115.2	96.6	16.8	1,305.6	8.8	Post-Newsweek Cable	396,000	12/88
24	24	Maclean Hunter	111.1	95.3	16.6	181.1	61.3	Maclean Hunter Cable TV	331,599	12/88
25	25	Multimedia Inc.	101.9	90.8	12.2	374.0	27.2	Multimedia Cablevision	313,167	4/88
26	27	Oklahoma Publishing Co.	93.0	61.0	52.5	374.0	24.9			
27	26	Providence Journal Co.	78.0	79.0	(1.3)	243.0	32.1	Colony Communications	301,576	12/88
28	28	Media General	73.0	60.5	20.7	449.4	16.2	Media General (Fairfax)	161,000	12/88
29	29	Chronicle Publishing Co.	54.0	46.0	17.4	384.0	14.1	Western Communications	260,742	12/88
30	31	Blade Communications	35.0	29.0	20.7	225.2	15.5	Blade Communications	133,000	12/88
31	32	Landmark Communications	32.2	25.9	24.3	363.6	8.9			
32	30	Playboy Enterprises	23.4	29.2	(19.9)	143.8	16.3			
33	33	Howard Publications	15.0	15.0	0.0	190.0	7.9	Falcon Cable TV*	630,000	12/88
33	34	Hearst Corp.	15.0	11.0	36.4	1,986.0	0.8	Hearst Communications of Calif.	57,410	12/88
35	35	Donrey Media Group	10.3	9.0	14.4	300.0	3.4	Donrey Cablevision	46,585	12/88
36	36	Copley Newspapers	7.4	3.4	117.6	381.3	1.9	Copley/Colony Cablevision	45,000	12/88
		TOTALS	11,500.9	9,282.2	23.9	31,009.5	37.1		31,133,333	

Notes: Dollars are in millions. Rankings given for 1987 in this table are based on figures restated or estimated in 1988, some of which are pro forma. Only 100 leading media cos. are ranked in this table. *Only partially owned by Howard. See accompanying chart for channel ownership among media cos. **Sources**: Cable revenues are ADVERTISING AGE estimates. Total number of basic subscribers in the MSO are from Cabletelevision Advertising Bureau, Cable TV Fact Book, 1989 edition.

Properties of the leading media companies

NEWSPAPERS

Advance Publications
Newhouse Newspapers
Star Ledger
One Star Ledger Plaza
Newark, N.J. 07101
(201) 877-4141

ALABAMA: *Birmingham News, Huntsville Times, Huntsville News, Mobile Press, Mobile Register* LOUISIANA: (New Orleans) *Times-Picayune* MASSACHUSETTS: (Springfield) *Sunday Republican* (Springfield) *Union News* MICHIGAN: Booth News papers, including *Ann Arbor News, Bay City Times, Flint Journal, Grand Rapids Press, Jackson Citizen Patriot, Kalamazoo Gazette, Muskegon Chronicle, Saginaw News* MISSISSIPPI: (Pascagoula) *Mississippi Press* NEW JERSEY: (Jersey City) *Jersey Journal*, (Newark) *Star Ledger*, (Trenton) *Times* NEW YORK: *Staten Island Advance, Syracuse Herald Journal*, (Syracuse) *Post Standard* OHIO: (Cleveland) *Plain Dealer* OREGON: (Portland) *Oregonian* PENNSYLVANIA: (Harrisburg) *Patriot*

Affiliated Publications
135 Morrissey Blvd
Boston, Mass. 02107-2378
(617) 929-3300

Boston Globe

A.H. Belo Corp.
Communications Center
P.O. Box 655237
Dallas, Texas 75265
(214) 977-6606

TEXAS: *Dallas Morning News*; Dallas-Fort Worth Suburban Newspapers—*Arlington Daily News, Garland Daily News, Grand Prairie Daily News, Irving Daily News, Mid-Cities Daily News, Richardson Daily News* **Non-dailies:** Dallas-Fort Worth Suburban Newspapers-*Metrocrest News*

Berkshire Hathaway
1440 Kiewit Plaza
Omaha, Neb. 68131
(402) 346-1400

NEW YORK: *Buffalo News*

Blade Communications
541 Superior St
Toledo, Ohio 43660
(419) 245-6000

CALIFORNIA: *Monterey Herald*; OHIO: (Toledo) *Blade*; PENNSYLVANIA: *Pittsburgh Post-Gazette*

Capital Cities/ABC
77 W. 66th St.
New York, N.Y. 10023-6298
(212) 456-7777

ILLINOIS: *Belleville News-Democrat*; MICHIGAN: (Pontiac) *Oakland Press*; MISSOURI: *Kansas City Times, Kansas City Star*; OREGON: *Albany Democrat-Herald*, (Ashland) *Daily Tidings*; PENNSYLVANIA: (Wilkes-Barre) *Times Leader*; TEXAS: *Fort Worth Star-Telegram* **Non-dailies:** CALIFORNIA: (Orange County, San Diego, Sacramento, Stockton) *Penny Saver*; CONNECTICUT: *Advertiser, Compass, Dolphin, Hamden Chronicle, Home News, Niantic News, North Haven Post, Wallingford Post, Branford Review, Clinton Recorder, Pictorial Gazette, Regional Standard, Shore Line Times, Ad Haven, Pennysaver, Peddler/Sentinel, Tradewinds, Southwinds*; ILLINOIS: *News Reporter, Cahokia-Dupo Herald, St. Louis Daily Record, St. Louis Countian, O'Fallon Progress, Highland News Leader, Command Post*; KANSAS/MISSOURI: (Wichita, Topeka, Kan.; Springfield, Mo.) *Pennypower Shopping News*; MASSACHUSETTS: *Braintree Forum, Bridgewater Townsman, Canton Journal, Carver Mariner, Cohasset Mariner, Hanover Manner, Hingham Manner, Holbrook Sun, Kingston Independent Voice, Marshfield Mariner, Norwell Mariner, Pembroke Mariner, Plymouth South Look, Randolph Mariner, Rockland/Abington South Look, Scituate Mariner, Weymouth News*; MICHIGAN: *Armada Times, Brown City Banner*; OREGON: *Gresham Outlook, Newport News-Times*, (Portland) *Nickel Ads, Springfield News, Cottage Grove Sentinel, Sandy Post, Lebanon Express*; RHODE ISLAND: *Pendulum, Narragansett Times, Standard Times*; WASHINGTON: *Little Nickel, Nickel Nik*

Central Newspapers
307 North Pennsylvania St
Indianapolis, Ind. 46204
(317) 633-9027

ARIZONA: *Arizona Republic, Phoenix Gazette*; INDIANA: *Indianapolis News, Indianapolis Star, Muncie Evening Press, Muncie Star, Vincennes Sun-Commercial* **Non-dailies:** ARIZONA: (Phoenix) *Arizona Business Gazette*

Chicago Sun-Times Co.
401 N. Wabash Ave.
Chicago, Ill. 60611
(312) 321-3000

ILLINOIS: (Chicago) *Sun-Times* **Non-dailies:** ILLINOIS: *Star Newspapers-Williams Press* (Chicago Heights): *Chicago Heights Star, Crete & University Park Star, Frankfort-Mokena-New Lenox Star, Harvey-Markham Star, Hazel Crest-Country Club Hills Star, Homewood & Flossmoor Star, Matteson & Richton Park Star, Oak Forest Star, Orland Park Star, Park Forest Star, South Holland & Dolton Star, Tinley Park Star, Homer Township Star, Lansing-Lynwood Star, Burnham-Calumet City Star, Palos Area Star, Alsip/Crestwood Star, Worth/Chicago Ridge Star, Pioneer Press, Algonquin Countryside, Barrington Courier Review, Buffalo Grove Countryside, Cary-Grove Countryside, Crystal Lake Mirror, Deerfield Review, Elm Leaves, Evanston Review, Forest Leaves, Forest Park News, Franklin Park Herald-Journal, Glencoe News, Glenview Announcements, Harwood Heights News, Highland Park News, Lake Forester, Lake Zurich Courier, Libertyville Review, Maywood Herald, Melrose Park Herald, Morton Grove Champion, Mundelein Review, Niles Spectator, Norwich News, Northbrook Star, Oak Leaves, Palatine Countryside, Park Ridge Advocate, River Grove Messenger, Rosemont Progress, Schiller Park Independent, Skokie Review, Vernon Hills Review, Westchester Herald, West Proviso Herald, Wheeling Countryside, Wilmette Life, Winnetka Talk*

Chronicle Publishing Co.
Fifth & Mission Sts.
San Francisco, Calif. 94119
(415) 441-4444

CALIFORNIA: *San Francisco Chronicle*; (San Francisco) *Examiner & Chronicle* (owned jointly with Hearst Corp.), *Idlewild Town Crier*; ILLINOIS: (Bloomington-Normal) *Pantagraph*; MASSACHUSETTS: *Worcester Telegram and Evening Gazette, Marlboro Enterprise*, (Clinton) *Daily Item, Hudson Daily Sun*

CMP Publications
600 Community Dr.
Manhasset, N.Y. 11030
(516) 562-5000

NATIONAL: *Electronic Buyers' News, Electronic Engineering Times, Computer Systems News, Computer Retail News, CommunicationsWeek, Business Travel News, Tour & Travel News, HealthWeek, UNIX Today!, Macintosh News, CommunicationsWeek International, Electronic World News*

Cooke Media Group
Kent Farms
Middleburg, Va. 22117
(703) 687-4000

CALIFORNIA: (Los Angeles) *Daily News* **Non-dailies:** COLORADO: *Steamboat Springs Pilot*; NEW MEXICO: *Ruidoso News, Socorro Defensor Chieftan*

Copley Newspapers
7776 Ivanhoe Ave.
La Jolla, Calif. 92037
(619) 454-0411

CALIFORNIA: (San Diego) *Tribune, San Diego Union*, (San Pedro) *News-Pilot*, (Torrance) *Daily Breeze*, (Santa Monica) *Outlook*; ILLINOIS: (Aurora) *Beacon-News*, (Elgin) *Daily Courier-News*, (Joliet) *Herald-News, Lincoln Courier*, (Springfield) *State Journal-Register*, (Waukegan/N.Chicago) *News-Sun*, (Wheaton) *Daily Journal* **Non-dailies:** CALIFORNIA: *Borrego Sun*. Also, 23 non-paid circulation weeklies and shoppers associated with dailies

Cowles Media Co.
329 Portland Ave.
Minneapolis, Minn. 55415
(612) 375-7000

ARIZONA: *Scottsdale Progress*; MINNESOTA: (Minneapolis) *Star Tribune*; MONTANA: *Great Falls Tribune*; SOUTH DAKOTA: *Rapid City Journal*; IDAHO: (Burley) *South Idaho Press* **Non-dailies:** COLORADO: Sentinel newspapers in Arapahoe, Arvada, Aurora, Commerce City, Englewood, Lakewood, Littleton, North Glen Thornton, South Jefferson, Westminster, Wheat Ridge; IDAHO: *Minidoka News, Reminder Shopper*

Cox Enterprises
1400 Lake Hearn Dr.
Atlanta, Ga. 30319
(404) 843-5000

ARIZONA: *Chandler Arizonan-Tribune, Mesa Tribune, Tempe Daily News-Tribune, Yuma Daily Sun*; COLORADO: (Grand Junction) *Daily Sentinel*; FLORIDA: *Palm Beach Daily News, Palm Beach Post, Palm Beach Life*; GEORGIA: (Atlanta) *Constitution*, (Atlanta) *Journal*; OHIO: *Dayton Daily News, Springfield News-Sun*; TEXAS: *Austin American-Statesman*, (Nacogdoches) *Daily Sentinel, Longview Morning Journal, Longview News, Lufkin Daily News, Orange Leader, Port Arthur News, Waco Tribune-Herald* **Non-dailies:** ARIZONA: (Mesa) *Arizona Pennysaver*, (Yuma) *Valley Foothills News*; COLORADO: (Grand Junction) *Shopping News*; FLORIDA: (West Palm Beach) *Florida Pennysaver*; OHIO: (Dayton) *DownTowner, Town & Country Times*, (Springfield) *Tri-County Shoppers News*; TEXAS: *Community Post*, (Port Arthur) *Opportunity Valley News*, (Nacogdoches) *Garrison News*

Dispatch Printing Co.
University Club
40 S. 3rd St.
Columbus, Ohio 43216
(614) 461-5000

OHIO: *Columbus Dispatch*

Donrey Media Group
920 Rogers Ave.
Fort Smith, Ark. 72901
(501) 785-7810

ARKANSAS: (Arkadelphia) *Daily Siftings Herald*, (Rogers) *Northwest Arkansas Morning News, Pine Bluff Commercial*, (Fort Smith) *Southwest Times Record, Springdale News, Southern Standard*; CALIFORNIA: *Chico Enterprise-Record*, (Red Bluff) *Daily News, Hemet News, Lompoc Record, Ontario Daily Report*, (Pomona) *Progress Bulletin, Redlands Daily Facts, Ukiah Daily Journal, Vallejo Times-Herald*, (Woodland) *Daily Democrat*; HAWAII: (Hilo) *Hawaii Tribune-Herald*, (Kailua-Kona) *West Hawaii Today*; INDIANA: *Washington Times-Herald*; IOWA: *Clinton Herald, Oskaloosa Herald*; KENTUCKY: *Glasgow Daily Times*; MISSISSIPPI: *Picayune Item*; MISSOURI: *Moberly Monitor-Index & Democrat*; NEVADA: (Carson City) *Nevada Appeal, Ely Daily Times, Las Vegas Review-Journal*; NEW MEXICO: *Alamogordo Daily News*; NORTH DAKOTA: *Minot Daily News*; OKLAHOMA: *Altus Times, Bartlesville Examiner-Enterprise, Blackwell Journal-Tribune, Chickasha Daily Express, Claremore Daily Progress, Durant Daily Democrat*, (Frederick) *Daily Leader, Guthrie Daily Leader, Guymon Daily Herald, Henryetta Daily Free-Lance, Holdenville Daily News, Norman Transcript, Okmulgee Daily Times, Pauls Valley Daily Democrat, Wewoka Daily Times*; TENNESSEE: (Columbia) *Daily Herald*; TEXAS: *Athens Daily Review, Borger News-Herald, Cleburne Times-Review, Denison Herald, Gainesville Daily Register, Jacksonville Daily Progress, Kilgore News Herald, Sherman Democrat, Sweetwater Reporter, Weatherford Democrat*; WASHINGTON: (Aberdeen) *Daily World*, (Auburn, Kent, Renton) *Valley Daily News* **Non-dailies:** ARKANSAS: (Arkadelphia) *Advertiser, Booneville Democrat, Southwest American*, (Fort Smith) *Market Place*, (Springdale) *Preview*; CALIFORNIA: *Mid-Valley News*, (Chico) *Off the Record, Moreno Valley Butterfield Express*, (Hemet) *Riverside Valley News Advertiser, San Jacinto Valley Register, Fort Bragg Advocate-News*, (Fort Bragg) *Coast Plus Edition, Mendocino Beacon*, (Lompoc) *Mission Valley Review, Montclair Tribune, Rancho Cucamonga Times*, (Ontario) *Upland News, Bulletin, La Verne Leader*, (Pomona) *San Dimas Press*, (Red Bluff) *Times Sentinel*, (Redlands) *Community Spotlight*, (Ukiah) *Buyer's Guide*, (Vallejo) *Bargain Hunter*, (Woodland) *Weekly Democrat*; ILLINOIS: (Savanna) *Northwestern Illinois Dispatch, Savanna Times Journal*; IOWA: *Clinton Herald, Oskaloosa Herald*; KENTUCKY: *Glasgow Republican*; MISSISSIPPI: (Picayune) *Shopper*, (Picayune) *Poplarville Democrat*; MISSOURI: *Randolph County Times Herald*, (Moberly) *Regional Super Saver*; NEVADA: (Carson City) *Chronicle*, (Las Vegas) *Family Fare*; NEW MEXICO: *Lincoln County Weekly News*, (Alamorgordo) *Otero County Weekly News*; NORTH DAKOTA: (Minot) *Review*; OKLAHOMA: *Farm & Ranch Report*, (Altus) *Southwest Shopper, Dewey Herald-Record*, (Bartlesville) *Living/Morning American*, (Blackwell) *Times-Record, Port of Catoosa Times-Herald*, (Claremore) *Will Rogers Country News*, (Durant) *Weekly News*, (Frederick) *Tipton Leader*, (Guthrie) *Market Place, Guymon*, (Henryetta) *Super Paper*, (Norman) *Spotlight*, (Okmulgee) *Mainstream Edition*, (Pauls Valley) *Merchant's Choice*, (Pawhuska) *Osage Journal-News, Pawhuska Journal-Capital*; TENNESSEE: *Mt. Pleasant Record, Value Guide*, (Columbia) *Spring Hill Morning Sun*; TEXAS: *Advertiser, Athens Weekly Review, Cedar Creek Pilot*, (Athens) *Malakoff News, High Plains Sampler*, (Borger) *Stinnett Hutchinson County Herald*, (Cleburne) *Johnson County News*, (Gainesville) *Shopping News, Cherokee County Banner*, (Jacksonville) *Shopping Guide*, (Sweetwater) *Nolan County News*, (Weatherford) *Parker County News*; WASHINGTON: (Aberdeen) *East County News*, (Auburn, Kent, Renton) *Wednesday Only*

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World Financial Center
200 Liberty St.
New York, N.Y. 10281
(212) 416-2000

Asian Wall Street Journal, Wall Street Journal, Wall Street Journal/Europe; Ottaway Newspaper Group-ARIZONA: (Sun City) *News-Sun*; CALIFORNIA: *Santa Cruz Sentinel*; CONNECTICUT: (Danbury) *News-Times*; KENTUCKY: (Ashland) *Daily Independent*; MASSACHUSETTS: *Beverly Times, Peabody Times*, (Hyannis) *Cape Cod Times*, (Gloucester) *Daily Times*, (New Bedford) *Standard-Times*, (Newburyport) *Daily News*; MICHIGAN: *Traverse City Record-Eagle*; MINNESOTA: (Mankato) *Free Press, Owatonna People's Press*; MISSOURI: *Joplin Globe*; NEW YORK: (Middletown) *Times Herald-Record*, (Oneonta) *Daily Star*, (Plattsburgh) *Press Republican*, (Port Jervis) *Tri-State Gazette*; NORTH CAROLINA: *Chapel Hill Newspaper*; OREGON: *Medford Mail Tribune*; PENNSYLVANIA: (Stroudsburg) *Pocono Record, Sharon Herald, Sunbury Daily Item*

DTH Media
1101 Pacific
Dallas, Texas 75202
(214) 720-6111

FLORIDA: (Hollywood) *Sun-Tattler*; PENNSYLVANIA: *Scrantonian Tribune*; TEXAS: *Dallas Times Herald*

Forbes Inc.
60 Fifth Ave.
New York, N.Y. 10011
(212) 620-2200

NEW JERSEY: **Non-dailies:** *Bound Brook Chronicle, Greenbrook-North Plainfield Journal, Metuchen-Edison Review, Middlesex Chronicle, Piscataway-Dunellen Review, Somerset Messenger-Gazette, South Plainfield Reporter, Franklin Focus, Cranford Chronicle, Middlesex Hills Badminster Press, Highland Park Herald*

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Top 30 Daily Newspapers in U.S.

Ranked by 1988-1989 rate of growth.

	1989 Daily Circulation	88-89 Percent Change	Rank by 1989 Daily Circulation
Houston Post	322,193	6.6%	30
Orange County Register	344,965	6.1%	28
Newsday	697,509	4.9%	8
Phoenix Republic	372,209	4.4%	24
St. Petersburg Times	**375,870**	**4.0%**	**23**
Houston Chronicle	427,844	3.9%	19
New York Times	1,117,376	3.6%	5
Miami Herald	442,976	2.8%	18
Rocky Mountain News	365,493	2.4%	25
Boston Globe	509,573	2.3%	14
Boston Herald	360,046	1.6%	26
Washington Post	812,419	0.3%	6
St. Louis Post-Dispatch	378,225	0.0%	22
Cleveland Plain Dealer	447,822	-0.3%	17
USA Today	1,341,811	-0.3%	2
Newark Star-Ledger	458,049	-0.4%	16
Minneapolis Star Tribune	403,300	-0.7%	20
Dallas Morning News	359,976	-0.8%	27
Philadelphia Inquirer	500,136	-0.8%	15
Los Angeles Times	1,119,840	-1.2%	4
Baltimore Sun	402,242	-1.4%	21
Portland Oregonian	327,603	-1.7%	29
Detroit News	676,025	-1.8%	9
San Francisco Chronicle	556,196	-2.3%	11
Detroit Free Press	629,275	-2.9%	10
New York Post	535,407	-3.6%	13
New York Daily News	1,230,186	-4.1%	3
Chicago Tribune	740,154	-4.4%	7
Wall Street Journal	1,931,410	-4.6%	1
Chicago Sun-Times	554,670	-11.3%	12

Source: ABC Fas-Fax reports for three or six months ending March 31, 1988 and 1989.

Top 30 Sunday Newspapers in U.S.

Ranked by 1988-1989 rate of growth.

	1989 Sunday Circulation	88-89 Percent Change	Rank by 1989 Sunday Circulation
Houston Chronicle	585,845	5.9%	16
St. Petersburg Times	**471,472**	**4.2%**	**26**
Rocky Mountain News	411,023	3.4%	30
San Diego Union	437,784	3.4%	27
Miami Herald	546,801	1.5%	21
Dallas Morning News	534,843	1.5%	22
Washington Post	1,149,856	1.5%	4
Portland Oregonian	415,926	1.3%	28
St. Louis Post-Dispatch	560,618	1.1%	19
Baltimore Sun	485,269	1.0%	25
New York Times	1,663,530	1.0%	1
Philadelphia Inquirer	1,010,530	0.9%	6
Newsday	707,787	0.8%	9
Atlanta Constitution	665,186	0.8%	13
Newark Star-Ledger	675,980	0.7%	12
Chicago Tribune	1,137,447	0.7%	5
Cleveland Plain Dealer	570,737	0.6%	17
Phoenix Republic	566,510	0.5%	18
Kansas City Times-Star	414,689	0.5%	29
Minneapolis Star Tribune	650,317	0.3%	14
Los Angeles Times	1,423,310	0.3%	3
Pittsburgh Press	560,199	0.2%	20
Seattle Times Post Intell.	504,993	-0.1%	24
Boston Globe	787,385	-0.3%	8
Milwaukee Journal	506,517	-1.2%	23
Detroit News	820,655	-1.9%	7
San Francisco Chronicle	700,989	-3.1%	10
Detroit Free Press	693,943	-3.8%	11
New York Daily News	1,526,413	-6.0%	2
Chicago Sun-Times	595,311	-6.6%	15

Source: ABC Fas-Fax reports for three or six months ending March 31, 1988 and 1989.

The Audit Bureau of Circulations (ABC) is the official auditing agency for newspaper circulations.

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SYSTEMS: Newhouse Broadcasting. MetroVision—ILLINOIS: Blue Island, Berwyn, Crestwood, Hickory Hills (90% interest), Melrose Park, Midlothian, Northlake, Palos Hills, Posen, Stickney, Tinley Park, Westhaven. INDIANA: Portage. KENTUCKY: Newport. LOUISIANA: St. John the Baptist Parish. NEBRASKA: Auburn, Crete, David City, Fairbury, Fremont, Humbolt, Lincoln, Nebraska City, Pawnee City, Seward, Superior, Table Rock, Tecumseh, York. OHIO: Green Township. TEXAS: Belton, Belmead, Beverly Hills, Greenville, Killeen, Lacey-Lakeview, Robinson, North Weedway, Temple, Waco. WISCONSIN: Lannon (90% interest), Menomonee Falls. WYOMING: Sheridan. NewsChannels Corp.—ALABAMA: Anniston, Eufala, Greenville, Wetumpka. NEW YORK: Binghamton, Carthage, Cooperstown, Corning, Delhi, Fulton, Malone, Massena, Ogdensburg, Oneonta, Potsdam, Rome, Sidney, Syracuse, Troy. PENNSYLVANIA: Canonsburg, Coraopolis, Crescent Township, Moon Township, Neville Township. Vision Cable Communications—FLORIDA: Clearwater (90% interest), Kenneth City, Pinellas Park. LOUISIANA: Alexandria, Houman. NEW JERSEY: Fort Lee. NORTH CAROLINA: Albemarle, Concord, Jacksonville, Morehead City, Salisbury, Shelby, Southport, Wilmington. PENNSYLVANIA: DuBois. SOUTH CAROLINA: Darlington, Florence, Sumter.

Blade Communications
541 Superior St.
Toledo, Ohio 43660
(419) 245-6000

SYSTEMS: OHIO: Buckeye Cablevision—Harbor View, Holland, Lucas County, Maumee, Ottawa Hills, Oregon, Perrysburg, Perrysburg Township, Rossford, Springfield Township, Sylvania, Sylvania Township, Toledo, Washington Township, Wood County, Erie County Cablevision—Bay View, Castalia, Erie County, Huron, Huron Township, Margaretta Township, Oxford Township, Perkins Township, Sandusky. MICHIGAN: Monroe Cablevision—Monroe, Frenchtown Township.

Cablevision Industries Corp.
P.O. Box 311
Liberty, N.Y. 12754
(914) 292-7550

SYSTEMS: ALABAMA: Daleville, Dothan. CALIFORNIA: Los Angeles. FLORIDA: Cape Coral, Casselberry, De Land, Golden Gate, Holly Hill, Immokalee, La Belle, Live Oak, New Smyrna Beach, Palmetto, St. Augustine, Suwannee, Winter Garden. LOUISIANA: Lafourche Parish, Slidell. MARYLAND: Calvert County. MASSACHUSETTS: Fairhaven, Foxborough, Holliston, Medfield, Mendon. MICHIGAN: Dearborn. MISSISSIPPI: Picayune. NEW YORK: Albion, Avon, Bergen, Caledonia, Canandaigua, Cayuga, Covington, East Bloomfield, Elba, Fort Montgomery, Geneva, Hague, Highland Falls, Le Roy, Macedon, Middleport, Montour Falls, Newark, New Paltz, Oakfield, Phelps, Port Jervis, Roxbury, Saugerties, Sodus, South Seneca, Stafford, Sullivan County, Walden, Wallkill, Watkins Glen. NORTH CAROLINA: Cary, Goldsboro, Guilford County, Wilson. OKLAHOMA: Pryor. PENNSYLVANIA: Corry, Greenville, Sayre. SOUTH CAROLINA: Columbia, Dorchester County. TENNESSEE: Selmer. VIRGINIA: Danville. WEST VIRGINIA: Clarksburg, Fairmont.

Cablevision Systems Corp.
One Media Crossways
Woodbury, N.Y. 11797
(516) 364-8450

SYSTEMS: ARKANSAS: Paragould. CONNECTICUT: Norwalk. ILLINOIS: Oak Park, Rockford. MAINE: Auburn, Bangor. MASSACHUSETTS: Boston, Brookline, Hudson. MICHIGAN: Kalamazoo. MISSOURI: Caruthersville. NEW JERSEY: Bayonne, Cresskill. NEW YORK: Amagansett, Bronx, Dover Plains, Hauppauge, Lynbrook, Penn Yan, Port Chester, Rensselaer, Wellsville, Windsor, Woodbury, Yonkers, Yorktown Heights. OHIO: Cleveland Heights. **CHANNELS:** Rainbow Program Enterprises—SportsChannel America, SportsChannel New York, SportsChannel New England, SportsChannel Chicago, SportsChannel Florida, SportsChannel Ohio; PRISM (Philadelphia area); Z Channel (Los Angeles); American Movie Classics; Bravo

Capital Cities/ABC
77 W. 66th St.
New York, N.Y. 10023-6298
(212) 456-7777

CHANNELS: ESPN (80% interest)

Century Communications Corp.
50 Locust Ave.
New Canaan, Conn. 06840
(203) 966-8746

SYSTEMS: Century Cable—ALABAMA: Enterprise, Fort Payne, Cullman. CALIFORNIA: Albany, Benicia, Beverly Hills, Brea, Eagle Rock, Fort Bragg, La Habra, Mendocino, Redondo Beach, San Pablo, Santa Monica, Sherman Oaks, Ukiah, Ventura, West Hollywood, West Los Angeles, Yucca Valley. COLORADO: Colorado Springs, Trinidad. CONNECTICUT: Norwich, Old Lyme. GEORGIA: Brunswick. INDIANA: Huntington, Muncie, Newburgh. KANSAS: Liberal. KENTUCKY: Owensboro. MASSACHUSETTS: Lee. MISSISSIPPI: Indianola. NEW MEXICO: Lovington, Portales, Silver City, Tucumcari. NEW YORK: Norwich. NORTH CAROLINA: Laurinburg. OHIO: Portsmouth, Struthers. PENNSYLVANIA: Lykens, Sharon. PUERTO RICO: Levittown, San Juan. SOUTH CAROLINA: Dillon, Hartsville. VIRGINIA: Mountain-Clintwood, Norton, Roanoke. WASHINGTON: Longview. WEST VIRGINIA: Huntington, Morgantown, Red House. WISCONSIN: Wauwatosa. WYOMING: Evanston.

Chronicle Publishing Co.
Fifth & Mission Sts.
San Francisco, Calif. 94119
(415) 441-4444

SYSTEMS: Western Communications—CALIFORNIA: Butte County, Carmel-by-the-Sea, Carmel Valley, Chico, Clayton, Concord, Contra Costa County, Corning, Del Monte Forest, Del Ray Oaks, Glenn County, Hemet, Marina, Monterey County, Orland, Pacific Grove, Rancho California, Salinas, San Mateo County, Seaside, South San Francisco, Ventura County, Willows. NEW MEXICO: Dona Ana County, Las Cruces, Mesilla.

Comcast Corp.
1414 S. Penn Square
Philadelphia, Pa. 19102-2480
(215) 665-1700

SYSTEMS: Comcast Cable Comm.—ALABAMA: Dothan, Florence, Gadsden, Huntsville, Mobile, Tuscaloosa. ARKANSAS: Little Rock. CALIFORNIA: Central Orange Cluster, Inland Valley, Lompoc, North Orange Cluster, San Bernardino, Santa Maria, Simi Valley. CONNECTICUT: Clinton, Danbury, Groton, Middletown, New Haven. DELAWARE: Dover, Rehoboth, Georgetown, Salisbury. FLORIDA: Boca Raton, Marianna, Panama City, Perry/Quincy, Port Charlotte, Sarasota, Sebring/Bartow, Tallahassee, Venice, West Palm Beach. INDIANA: Ft. Wayne (Ind./Ohio), Indianapolis. KENTUCKY: Paducah (Ky./Ill.). MARYLAND: Baltimore County, Harford County, Howard County, Pocomoke, Salisbury. MICHIGAN: Flint, Grosse Point, Hillsdale, Pontiac, S.E. Michigan. MISSISSIPPI: Corinth (Miss./Tenn.), Laurel, Meridian, Tupelo. NEW JERSEY: Burlington County, Central, Gloucester County, Meadowlands, Monmouth County, N.W. New Jersey, Ocean County, Plainfield, Trenton. PENNSYLVANIA: Lower Merion, Philadelphia, Westmoreland, Willow Grove. SOUTH CAROLINA: Charleston. VIRGINIA: Chesterfield.

Continental Cablevision
Pilot House, Lewis Wharf
Boston, Mass. 02110
(617) 742-9500

SYSTEMS: CHICAGO REGION: Calumet City, Calumet Park, Dolton, Riverdale; Elmhurst, Berkeley, Oakbrook Terrace, Bensenville; Elmwood Park; Forest Park; Franklin Park, River Grove, Rosemont, Schiller Park; Lombard; Unincorporated DuPage County, Westchester, Hillside; Westmont, Clarendon Hills, Countryside, Hinsdale, Oakbrook, Unincorporated Westmont, Willowbrook; Unincorporated Cook County, Morton Grove. FLORIDA REGION: Jacksonville, St. Johns County. ILLINOIS-IOWA-MISSOURI REGION: Freeport, Cedarville, Stephenson County; Keokuk, Carthage, Hamilton, Warsaw; Kewanee; Lincoln, Logan County; Morton, Pekin, Groveland, Marquette Heights, N. Pekin, S. Pekin, Tazewell County, Tremont, Quincy; Bellevile, Fairview Heights, O'Fallon, St. Clair County, Swansea; Jennings, Bellefontaine Neighbors, Country Club Hills, Flordell Hills, Moline Acres, Northwoods, Pine Lawn, Riverview, Wherry Housing Base; Lake St. Louis, St. Charles County, St. Paul, Wentzville; Overland, Breckenridge Hills, Brentwood, Clayton, Edmundson, Maplewood, St. Ann, University City, St. Louis County Area B, Maryland Heights; Scott Air Force Base, Albers, Avision, Clinton County, Damiansville, Freeburg, Lebanon, Mascoutah, New Baden, St. Clair County, Shiloh, Summerfield, Trenton. MICHIGAN REGION: Dearborn Heights, Hazel Park; Holland; Jackson, Blackman Township, Rives Junction; Lansing, Dewitt, Eaton Rapids, Grand Lodge, Delhi, Delta, Dewitt, Eaton Rapids, Hillman; Lansing and Oneida Townships; Madison Heights; Oak Park; Roseville, Southfield, Lathrup Village; West Bloomfield Township; Westland. MINNESOTA REGION: St. Paul. NEW HAMPSHIRE-MASSACHUSETTS-MAINE-CONNECTICUT REGION: Dedham, Marion, Mattapoisett, Rochester, Wareham, Orleans, Brewster, Eastham, Provincetown, Truro, Wellfleet, Scituate, Cohassel, Hanover, Hingham, Hull, Norwell; Brockton (99.9% interest), Beverly, Hamilton, Marblehead, Topsfield, Wenham, Natick; Newton, Wayland, Wellesley, Weston, Reading, Saugus, Hahent, Watertown; Winchester, Weburn, Billerios, Burlington, Stoneham, Wilmington; Needham (99.7% interest); Concord, Alexandria, Allenstown, Antrim, Boscawan, Bow, Bridgwater, Bristol, Deering, Henniker, Hillsboro, Hopkinton, New Hampton, Pembroke; Dover, Berwick, Hebron, Madbury, Rollinsford, Somersworth, South Berwick, Exeter, Durham, Epping, Fremont, Hampton Falls, Newfields, Newmarket, North Hampton, Raymond, Seebrook; Lawrence, Mathuen, North Andovar; Portsmouth, Eliot, Greenland, Hampton, Kittery, New Castle, Newington, Rye, Stretham; Seco, Old Orchard Beach, Salem, Darry, Hampstead, Plaistow, Sandown; Hanson, East Bridgewater, Holbrook, West Bridgewater, Whitman; Middleboro, Lakeville, Berkeley, Dighton, Freetown; Stoughton, Avon, Easton, Raynham; Milton (96% interest); Pease Air Force Base, Quincy (98% interest); Randolph (94% interest). OHIO REGION: Athens, The Plains; Bay Village, Avon Lake; Bellevue, Clyde, Green Springs, Greencreek Township, Butler Township, Clayton, Englewood, Madison Township, Randolph Township, Trotwood, Union, Vandalia; Eastlake, Fairport Harbor, Grand River, Lakeline, Mentor, Painesville, Timberlake, Wickliffe, Willoughby, Willoughby Hills, Elyria, Carlisle and Elyria Townships; Fairborn, Donnelsville, Enon, New Carlisle, Bath, Bethel and Mad River Townships; Findley, Arlington, McComb, Mount Blanchard, Mount Cory, Rawson, Van Buren, Vantue; Fostoria, Arcadia, New Riagel, Sycamore, Tiffin; Galion, Crestline, N. Robinson; Huber Heights, Beth Township, Harrison Township; Kettering, Beavercreek, Beavercreek Township, Bellbrook, Centerville, Clearcreek Township, Corwin, Franklin Township, Miamisburg, Miami Township, Moraine, Oakwood, Springboro, Sugarcreek, Washington Township, Wayne Township, Waynesville, West Carrollton; Lancaster, Ashville, Berne Township, Baltimore, Bremen, Carroll, Circleville, Greenfield Township, Hocking Township, Lima Township, Millersport, Peteskela, Pleasant Township, Pleasantville, S. Bloomfield, Stoutsville, Sugar Grove, Thurston; N. Ridgeville, Amherst, S. Amherst, Amherst Township; Norwalk, Milan, Monroeville, Norwalk Township; Springfield, Harmony, Monroeville, Pleasant and Springfield Townships, S. Charleston, S. Vienna Village; Upper Sandusky, Nevada; Willard, Attica, Chatfield, Greenwich Village, New Haven, New Washington, N. Fairfield, Plymouth, Republic, Shiloh; Xania, Cedarville, Jamestown, New Jasper and Silver Creek Townships, Spring Valley, Wilberforce, Cedarville, Spring Valley and Xania Townships. VIRGINIA REGION: Richmond (88.8% interest); Ashland; Goochland County; Hanover County; Henrico County; James City County; York County. WESTERN NEW ENGLAND REGION: Ossining Town, Bedford, Briarcliff Manor, Mount Pleasant, New Castle, North Tarrytown, Ossining Village, Pleasantville, Tarrytown; Peekskill, Buchanan, Cortland, Croton-on-Hudson, Philipstown; Rockland, Haverstraw Town, Haverstraw Village, Pomona, Ramapo, Stony Point, West Haverstraw; Agawam, Granby, Holyoke, South Hadley, Southwick, Westfield, West Springfield; Deerfield, Bernardston, Northfield, Sunderland; Enfield; Northampton, Hatfield, Williamsburg; Springfield, Longmeadow. LOS ANGELES REGION: Bellflower; Carson; Compton; Corona, Riverside County; Covina, Los Angeles County; Downey, Bell Gardena, La Mirada, Lynwood, Paramount, Santa Fe Springs; Hollywood, Los Angeles, Venice, Wilshire; Inglewood; Maywood; Pomona; Tustin, Orange County; Westchester, Los Angeles, Los Angeles County; Westside, Culver City, Venice; South Central Los Angeles (80% interest). SIERRA REGION: Sierra Valleys, Hanford, Corcoran, Kings County, LeMoore; Tulare, Tulare County, Visalia, Fresno, County of Fresno, Clovis, Madera; Yuba City, County of Sutter, County of Yuba, Beals Air Force Base, Marysville, Wheatland; Reno, Washoe.

Cooke Media Group
Kent Farms
Middleburg, Va. 22117
(703) 687-4000

SYSTEMS: Cooke Cablevision—ALASKA: Fairbanks, Ketchikan, Juneau, Sitka. ARIZONA: Benson, Douglas; Green Valley, Sierra Vista, Tucson, Wilcox. GEORGIA: Cuthbert, Peachtree City. HAWAII: Hawaii Kai, Wailuku. ILLINOIS: Kankakee. MISSISSIPPI: Greenville. NEW MEXICO: Clovis. NEW YORK: Syracuse. NORTH CAROLINA: Ahoskie, Elizabeth City, Murfreesboro, Rocky Mount. OHIO: Blanchester, Wilmington. OREGON: Alturas, Astoria, Baker, Cottage Grove, The Dalles, Florence, Grants Pass, Klamath Falls, LaGrande, Medford, Redmond, Rogue, Roseburg, St. Helens. SOUTH CAROLINA: Aiken, Barnwell, Edgefield, Hilton Head, Johnston, McCormick, Saluda, Ware Shoals. TENNESSEE: Alcoa, Brentwood, Concord, Gatlinburg, Madisonville, Mt. Pleasant, Pigeon Forge, Rogersville, Sevierville, Sweetwater. TEXAS: Bryan/College Station, Paris, Victoria. VIRGINIA: Amherst, Emporia, Glasgow, South Boston, South Hill. WASHINGTON: Aberdeen, Centralia, Cle Elum, Dixie, Montesano, North Bend, Okanogan, Omak, Prescott, Starbuck, Waitsburg, Walla Walla, Washtucna, Yakima. WYOMING: Jackson Hole.

Copley Newspapers
7776 Ivanhoe Ave.
La Jolla, Calif. 92037
(619) 454-0411

SYSTEMS: Copley/Colony Cablevision—CALIFORNIA: San Pedro-Wilmington-Harbor City, Lomita, Los Angeles County, Costa Mesa, Cypress, unincorporated area in Orange County.

Cox Enterprises
1400 Lake Hearn Dr.
Atlanta, Ga. 30319
(404) 843-5000

SYSTEMS: Cox Cable Comm.—CALIFORNIA: Bakersfield, Humboldt Bay, San Diego, Santa Barbara. CONNECTICUT: Hartford. FLORIDA: Gainesville, Ocala, Pensacola. GEORGIA: Middle Georgia. ILLINOIS-IOWA: Quint Cities, Cedar Rapids. LOUISIANA: Jefferson Parish, New Orleans. MICHIGAN: Saginaw. NEBRASKA: Omaha. NEW YORK: Staten Island (under development). OHIO: Cleveland. OKLAHOMA: Oklahoma City. RHODE ISLAND: Cranston/Johnston. SOUTH CAROLINA: Myrtle Beach. TEXAS: Lubbock. VIRGINIA: Roanoke, Hampton Roads. WASHINGTON: Spokane.

Donrey Media Group
920 Rogers Ave.
Fort Smith, Ark. 72901
(501) 785-7810

SYSTEMS: Donrey Cablevision—ARKANSAS: Rogers. CALIFORNIA: Vallejo. OKLAHOMA: Bartlesville, Blackwell, Guymon.

Hearst Corp.
959 Eighth Ave.
New York, N.Y. 10019
(212) 649-2000

SYSTEMS: Pending sale: CALIFORNIA: Hearst Cablevision of California—Los Gatos, Milpitas, Mountain View, Newark, Santa Clara, Saratoga.

Houston Industries
800 Gessner, Ste. 700
Houston, Texas 77024
(713) 827-6824

SYSTEMS: KBLCOM Inc. (Rogers Cablesystems)—MINNESOTA: Minneapolis (92% interest), Minneapolis suburbs (88% interest)—Edina, Hopkins, Minnetonka, Eden Prairie, Richfield. OREGON: Portland. CALIFORNIA: Orange County—Huntington Beach, Westminster, Fountain Valley, Stanton, Garden Grove, Los Alamitos. TEXAS: Laredo, San Antonio.

Howard Publications
P.O. Box 570
Oceanside, Calif. 92054
(619) 433-5771

SYSTEMS: Choice TV—CALIFORNIA: Alhambra, Huntington Park, Norco, Norwalk, Pasadena, Riverside, San Gabriel, Temple City, Walnut, West Covina and unincorporated parts of Los Angeles County including Altadena.

Landmark Communications
150 W. Brambleton Ave.
Norfolk, Va. 23510
(804) 446-2000

CHANNEL: Weather Channel

Maclean Hunter
Maclean Hunter Bldg.
777 Bay St.
Toronto, Ontario M5W 1A7
(416) 596-5000

SYSTEMS: MICHIGAN: Barden Cablevision (59% interest), Maclean Hunter Cable TV. NEW JERSEY: Cable TV of Jersey City (80% interest), Suburban Cablevision.

Media General
333 E. Grace St.
Richmond, Va. 23219
(804) 649-6000

SYSTEMS: Fairfax Cable—VIRGINIA: Fredericksburg, Fairfax County.

Multimedia Inc.
P.O. Box 1688
Greenville, S.C. 29602
(803) 298-4373

SYSTEMS: Multimedia Cablevision—ILLINOIS: Alsip/Worth, Batavia, Chicago Ridge, DuPage County, Evergreen Park, Harvey, Hometown, Lisle, Markham, Oak Forest, Oak Lawn, Phoenix, Kane County, Four Lakes, South Holland, Villa Park. KANSAS: Bellaire,Crestview/Shadybrook, East Borough, Great Bend, Herington, Hoisington, Kechi, LaCrosse, Larned, Lyons, McConnell Air Force Base, McPherson, Medicine Lodge, Oaklawn, Park City, Rolling Hills, Sedgwick County, Sharon, Springdale/Timberlakes, Wichita, Wind Rose Lake. NORTH CAROLINA: Ayden, Battleboro, Beaufort County, Bridgeton, Clinton, Chocowinity, Craven County, Edgecombe County, Enfield, Greenville, Halifax, Kinston, La Grange, Lenoir County, Martin County, Nash County, Nashville, New Bern, Parmele, Pitt/Bethel, Princeville, River Bend, Robersonville, Rocky Mount, Sampson County, Scotland Neck, Sharpsburg, Tarboro, Trent Woods, Vanceboro, Walnut Creek, Washington, Wayne County, Winterville, Wingate. OKLAHOMA: Bethany, Bixby, Chickasha, Crescent, Cushing, Del City, Edmond, El Reno, Erin Springs, Garvin, Guthrie, Hall Park, Lindsay, Logan County, Midwest City, Moore, Mustang, Nichols Hill, Norman, Paula Valley, Payne County, Perry, Spencer, Stillwater, Tinker Air Force Base, Valley Brook, The Village, Warr Acres, Wyn-

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CHANNEL: Nashville Network

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919 N. Michigan Ave.
Chicago, Ill. 60611
(312) 751-8000

CHANNEL: Playboy Channel

Providence Journal Co.
75 Fountain St.
Providence, R.I. 02902
(401) 277-7000

SYSTEMS: Colony Comm.—CALIFORNIA: Los Angeles, San Pedro, Wilmington. FLORIDA: Hialeah, Coral Gables. MASSACHUSETTS: Fall River, Lowell, New Bedford. NEW YORK: Beacon, Hyde Park, Lloyd, Monroe, Wappingers Falls. RHODE ISLAND: Hopkinton, Westerly, Pawtucket.

Sammons Communications
500 S. Ervay, Ste. 200A
Dallas, Texas 75201
(214) 742-9828

SYSTEMS: ALABAMA: Russellville, Tuskegee. CALIFORNIA: Glendale, Turlock, Whittier. CONNECTICUT: Waterbury. GEORGIA: West Point. ILLINOIS: Jacksonville, Ottawa. INDIANA: Logansport. KENTUCKY: Middlesboro. MISSISSIPPI: Brookhaven, McComb, Natchez, Pascagoula. NEW JERSEY: Dover, Pleasantville, Vineland. NEW YORK: Cortland, Johnstown. NORTH CAROLINA: Black Mountain, Waynesville. OKLAHOMA: Clinton, Elk City. PENNSYLVANIA: Bensalem, Easton, Emmaus, Fleetwood, Gettysburg, Morrisville, Oil City. TENNESSEE: Bristol, Johnson City, Morristown. TEXAS: Denton, Dumas, Duncanville, Fort Worth, Pampa, Park City, Tarrant County. VIRGINIA: Covington, Petersburg. WASHINGTON: Moses Lake.

Scripps Howard
1100 Central Trust Tower
Cincinnati, Ohio 45202
(513) 977-3000

SYSTEMS: CALIFORNIA: Sacramento. COLORADO: Fort Lupton, Lafayette, Longmont, Louisville, Parachute. FLORIDA: De Bary, Madison. GEORGIA: Battlefield/Lookout Mountain, Blue Ridge, Calhoun, Claxton, Dallas, Elberton, Glenville, Granger Co., Homersville, Metter, Millen, Montezuma, Monticello, North DeKalb, Rome, Rossville, Tallapoosa, Union City, Walker County, Warrenton, Waynesboro. INDIANA: Tell City. KENTUCKY: Barbourville, Campbellsville, Elizabethtown, Glasgow, Greenville, Knoxville, Lake City/LaFollette, Livingston. SOUTH CAROLINA: Newberry. TENNESSEE: Chattanooga, Knoxville, Gray, Greenville. VIRGINIA: Glade Springs/Abingdon. WEST VIRGINIA: Bluefield.

Storer Holdings
12000 Biscayne Blvd.
Miami, Fla. 33181-2710
(305) 899-1000

SYSTEMS: SCI Holdings—ALABAMA: Alabama area (79,500 subscribers). ARKANSAS: Arkansas area (73,500 subscribers). CONNECTICUT: Connecticut area (133,400 subscribers). DISTRICT OF COLUMBIA: Capital area (90,600 subscribers). FLORIDA: South Florida area (167,800 subscribers), West Florida area (179,200 subscribers). GEORGIA: Georgia area (67,600 subscribers). KENTUCKY: Kentucky area (234,100 subscribers). NEW JERSEY: New Jersey area (219,300 subscribers). SOUTH CAROLINA: South Carolina area (68,800 subscribers). TEXAS: Dallas/Ft. Worth area (90,700 subscribers), Houston area (104,000 subscribers). VIRGINIA: Virginia area (45,500 subscribers).

TCI
Regency Center One, Ste. 600
4643 S. Ulster St.
Denver, Colo. 80237
(303) 721-5500

SYSTEMS: TCI systems, 3.6 million subscribers; United Artists Communications (60% interest), 880,000 subscribers; Heritage Communications, 891,000 subscribers; WestMarc Communications, 347,000 subscribers; Communication Services (80% interest), 230,000 subscribers (50% interest).

TeleCable Corp.
740 Duke St.
Norfolk, Va. 23510
(804) 624-5000

SYSTEMS: ALABAMA: Auburn, Decatur, Selma. FLORIDA: Margate. GEORGIA: Columbus. ILLINOIS: Bloomington/Normal. INDIANA: Kokomo. KANSAS: Overland Park. KENTUCKY: Lexington, Radcliff. MISSOURI: Springfield. NORTH CAROLINA: Roanoke Rapids. SOUTH CAROLINA: Greenville, Spartanburg. TENNESSEE: Cleveland. TEXAS: Arlington, Plano, Richardson. VIRGINIA: Wytheville. WEST VIRGINIA: Beckley, Princeton. WISCONSIN: Racine.

Time Inc.
Time & Life Bldg.
Rockefeller Center
New York, N.Y. 10020
(212) 586-1212

SYSTEMS: American Television & Comm. Corp. (82% ownership)—ALABAMA: Birmingham. ARKANSAS: El Dorado. CALIFORNIA: Arvin/Lamont/Tehachapi, Orange County, San Diego, San Marino, S. Pasadena. COLORADO: Canon City, Colorado Springs, Littleton, Highlands Ranch, Northglenn, Thornton, Wheat Ridge. CONNECTICUT: Torrington. GEORGIA: Savannah. FLORIDA: Orlando. HAWAII: Honolulu. ILLINOIS: Champaign/Urbana. INDIANA: Indianapolis, Marion, Terre Haute. IOWA: Council Bluffs. KANSAS: Chanute, Emporia, Independence, Neodesha, Parsons. KENTUCKY: Hartford/Beaver Dam, Madisonville, Mayfield, Murray. LOUISIANA: Monroe, Shreveport. MAINE: Portland. MINNESOTA: Mankato, Marshall, Montevideo. MISSISSIPPI: Jackson. MISSOURI: Boonville, Chillicothe, Kennett, Marshall, Maryville, St. Louis. NEBRASKA: Columbus, Falls City. NEW YORK: Albany, Ithaca, Manhattan, Queens, Rochester. NORTH CAROLINA: Charlotte, Fayetteville, Greensboro, Raleigh-Durham. OHIO: Columbus, Delaware. OKLAHOMA: Woodward. PENNSYLVANIA: Erie, Franklin, Johnstown, Levittown, N. Versailles, Monroeville, Reading, Swissvale/N. Braddock. TENNESSEE: West Memphis. TEXAS: Austin, Wichita Falls. VIRGINIA: Lynchburg. WEST VIRGINIA: Charleston. WISCONSIN: Appleton, Beloit, Chippewa Falls/Eau Claire/Hallie, Green Bay. **CHANNELS:** Cinemax, Home Box Office.

Times Mirror Co.
Times Mirror Square
Los Angeles, Calif. 90053
(213) 237-3700

SYSTEMS: Times Mirror Cable Television—ARIZONA: Bullhead City, Casa Grande, Lake Havasu, Nogales, Phoenix. CALIFORNIA: Orange County, Palos Verdes, North San Diego County. CONNECTICUT: Meriden. ILLINOIS: Springfield. INDIANA: Lafayette. KENTUCKY: Ashland. MASSACHUSETTS: Amherst, Greenfield, Palmer, Haverhill, Weymouth. NEW YORK: Long Island. OHIO: Caldwell, Cambridge, Coshocton, Defiance, Greenfield, Ironton, Logan, Marion, Napoleon, Newark, Newcomerstown, New Philadelphia/Uhrichsville, Toronto, Waverly, Wauseon. PENNSYLVANIA: Beaver Falls, Washington. RHODE ISLAND: Providence, Warwick. TEXAS: Del Rio, Kerrville, Midland, Texarkana, Uvalde. WEST VIRGINIA: Weirton.

Turner Broadcasting System
One CNN Center
P.O. Box 105366
Atlanta, Ga. 30348-5366
(404) 827-1500

CHANNELS: CNN/Cable News Network, CNN Headline News, WTBS superstation services, TNT/Turner Network Television.

United Artists Entertainment Co.
2930 E. 3rd Ave.
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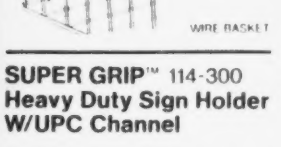

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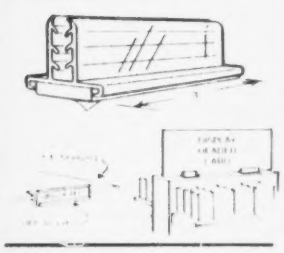

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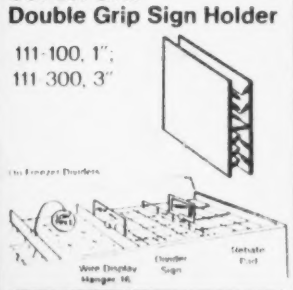

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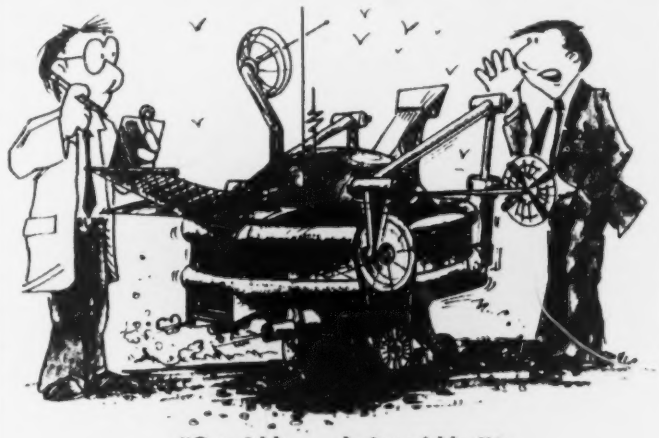
Publicly-held media companies by return on sales

Rank 1988	Rank 1987	Company	Return on sales 1988	Return on sales 1987	Total revenues 1988	Total revenues 1987	Net income 1988	Net income 1987	Media revenues 1988	Media revenues 1987
1	5	**CBS Inc.**	41.4	16.4	$2,777.7	$2,762.1	$1,149.9	$452.5	$2,776.8	$2,761.8
2	1	**LIN Broadcasting**	36.4	41.9	225.5	208.7	82.1	87.4	158.4	156.2
3	7	**Washington Post Co.**	19.7	14.2	1,367.6	1,315.4	269.1	186.7	1,305.6	1,240.3
4	16	**Berkshire Hathaway**	17.1	9.8	2,333.2	2,402.9	399.3	234.6	131.7	123.0
5	4	**Lee Enterprises**	16.2	18.8	252.5	237.6	40.9	44.6	234.8	223.4
6	6	**Dow Jones & Co.**	14.2	15.4	1,603.1	1,314.4	228.2	203.0	973.1	987.7
7	8	**Reuters Holdings PLC**	13.4	12.6	1,777.0	1,366.6	237.8	172.8	351.3	293.5
8	9	**Park Communications**	12.8	12.3	149.6	138.8	19.1	17.1	149.6	138.8
9	15	**Journal Communications**	11.2	10.3	443.2	404.0	49.6	41.6	274.9	249.2
10	14	**Gannett Co.**	11.0	10.4	3,314.5	3,079.0	364.5	319.4	3,211.3	2,991.3
11	18	**3M**	10.9	9.7	10,581.0	9,429.0	1,154.0	918.0	249.6	217.0
12	11	**Houston Industries**	10.8	12.0	3,649.5	3,628.2	395.3	435.0	162.9	142.6
13	20	**McGraw-Hill**	10.2	9.4	1,818.0	1,751.0	185.0	164.8	509.8	466.7
14	19	**Warner Communications**	10.1	9.6	4,206.1	3,403.6	423.2	328.1	496.4	425.0
15	22	**Times Mirror Co.**	10.0	8.5	3,332.6	3,142.3	331.9	266.5	2,677.9	2,548.9
16	17	**New York Times Co.**	9.9	9.8	1,700.0	1,642.4	167.7	160.3	1,700.1	1,642.4
17	13	**United Artists Entertainment Co.**	9.3	10.7	1,103.0	875.8	102.8	93.4	513.6	431.6
18	21	**Thomson Corp.**	9.2	9.1	4,726.0	3,940.0	436.0	359.0	1,126.0	973.4
19	28	**Tribune Co.**	9.0	6.6	2,334.8	2,149.8	210.4	141.5	1,985.5	1,875.7
20	36	**Chris-Craft Industries**	8.5	4.4	250.8	241.3	21.4	10.6	230.6	216.7
21	29	**Capital Cities/ABC**	8.1	6.3	4,773.5	4,440.3	387.1	279.1	4,588.5	4,256.2
22	12	**McClatchy Newspapers**	8.1	11.5	355.8	331.7	28.8	38.0	352.6	328.9
23	25	**Knight-Ridder**	7.5	7.9	2,083.3	1,968.2	156.4	155.2	2,077.1	1,943.9
24	10	**Maclean Hunter**	7.5	12.0	1,044.7	840.9	78.1	101.1	181.1	163.2
25	23	**Central Newspapers***	7.0	8.1	417.6	402.7	29.3	32.8	417.6	402.7
26	34	**Meredith Corp.**	7.0	5.6	678.5	601.6	47.4	33.9	474.7	449.2
27	30	**General Electric Co.**	6.8	6.1	50,089.0	48,158.0	3,386.0	2,915.0	3,638.0	3,241.0
28	24	**Westinghouse Electric Corp.**	6.6	7.9	12,499.5	11,332.0	822.8	900.5	632.8	600.5
29	32	**Time Inc.**	6.4	6.0	4,507.0	4,193.0	289.0	250.0	3,686.0	3,306.0
30	39	**Multimedia Inc.**	6.1	3.0	439.6	410.8	26.9	12.5	374.0	352.6
31	35	**Scripps Howard**	5.8	5.5	1,214.5	1,147.0	70.1	63.5	1,203.3	1,128.5
32	37	**Pulitzer Publishing Co.**	5.0	4.2	391.0	367.3	19.6	15.3	391.0	367.3
33	26	**Cowles Media Co.**	3.9	7.5	315.8	295.1	12.2	22.2	315.0	295.1
34	33	**A.H. Belo Corp.**	2.6	5.8	385.7	381.7	10.1	22.3	385.4	381.7
35	43	**TCI**	2.5	0.3	2,282.0	1,709.4	56.0	5.6	1,705.1	1,225.1
36	3	**Associated Press**	2.4	18.8	270.8	247.8	6.6	46.7	261.3	239.3
37	27	**Playboy Enterprises**	1.6	6.9	159.8	161.8	2.6	11.1	143.8	144.9
38	31	**Media General**	1.2	6.0	755.7	715.3	8.8	42.9	449.4	424.1
39	42	**Century Communications Corp.**	1.0	0.9	163.3	109.8	1.6	1.0	160.0	106.0
40	38	**National Geographic Society**	(0.6)	3.1	428.9	387.0	(2.7)	11.9	245.4	223.4
41	41	**Advo-System**	(0.7)	1.7	589.0	520.5	(4.1)	8.7	589.0	520.5
42	45	**Viacom International**	(9.8)	(12.2)	1,258.5	1,010.7	(123.1)	(123.5)	1,113.8	938.5
43	44	**Comcast Corp.**	(10.6)	(3.0)	449.9	309.3	(47.6)	(9.4)	404.1	286.8
44	46	**Turner Broadcasting System**	(11.7)	(20.1)	806.6	652.4	(94.5)	(131.2)	537.6	436.4
45	2	**Affiliated Publications**	(15.1)	41.1	534.2	490.1	(80.9)	201.2	506.5	472.8
46	40	**Great American Communications Co.**	(19.0)	1.7	381.9	340.3	(72.4)	5.7	200.4	190.3
47	47	**Cablevision Systems Corp.**	(32.3)	(24.7)	493.5	299.5	(159.4)	(74.0)	493.5	299.5
48	49	**Storer Holdings**	(34.3)	(36.9)	472.1	419.8	(162.1)	(155.1)	472.1	419.8
49	48	**TVX Broadcasting Group**	(54.4)	(36.0)	150.8	133.4	(82.0)	(48.0)	150.8	133.4
		TOTAL	**8.0**	**7.4**	**136,338.3**	**125,810.4**	**10,878.8**	**9,271.9**	**45,369.8**	**41,382.9**

Notes: Dollars are in millions. Rankings given for 1987 in this table are based on figures restated or estimated in 1988, some of which are pro forma. Only companies among the 100 leading media companies are ranked in this table. *Central Newspapers is private, but released these sales and earnings figures. **Sources:** Company sources, annual reports and other public documents. Media revenues are Advertising Age estimates.

AA chart: Kevin Brown



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MAXWELL'S MARKET SHARES

Pet-food sales up slightly

By JOHN C. MAXWELL JR.

The pet-food industry continued its trend of modest growth with a 3% increase in dollar sales to about $5.9 billion for 1988.

Cat food again led the way with an increase of 3.8% to $2.29 billion, with experts estimating a 3% tonnage gain. Dog-food sales were a little under $3.6 billion, a 2.45% increase.

Dog-food volume was flat, with any sales improvement coming primarily from the increased pricing of premium products.

Increases in dollar sales for the industry are expected to keep outpacing volume growth by a substantial margin for the foreseeable future, due in part to the "trending up" of product lines.

Segment leaders within each of the categories remained virtually unchanged.

Dog treats exhibited another large gain, with an 8.4% increase in dollar sales to $430 million and a a 4%-to-5% increase in unit volume. The segment's unit growth is expected to do that well or better for the foreseeable future.

The soft-dry segment witnessed a large dollar gain of 11.9% to $242 million, mainly due to the strength of Kibbles 'N Bits 'N Bits 'N Bits.

Canned dog food had a 3.4% increase in dollar sales to $920 million with no unit growth for the year. Moist dog-food sales declined 1.5% to $192 million and volume fell 1%.

Canned and dry cat food turned in respective sales gains of 5.5% and 5.3% for 1988, bringing sales to $1.26 billion and $792 million. Unit growth for both segments increased an estimated 3%.

Moist cat food declined 9.2% in sales to $217 million with tonnage dropping about 5%. Cat treats remained at $20 million in sales, with no unit growth forecast for the year.

The continued strength in cat food is a positive for companies such as Ralston Purina Co., Heinz Pet Products and Carnation Co., which have a product emphasis in this category. Kal Kan Foods (Mars Inc.) and Alpo Petfoods (GrandMet USA) had the biggest sales gains with increases of 16.4% and 11.3% as Kal Kan moved up the market share ladder to fourth place behind Purina, Quaker Oats Co. and Carnation. Purina maintained its market share, while Kal Kan had the largest absolute increase of 1.2 points.

A number of factors are contributing to the cat-food gains. First is the upward trend in the number of cats. Second, the number of households with cats is increasing rapidly. This correspondingly points to more dispersed ownership. The ratio of cats per household has decreased in the past three years from 2.16 in 1986 to 2.10 in 1988, a faster rate of decrease than the dog ownership ratio.

Other demographic factors—the rise in two-income families, the increase in urban populations and the upward movement in the number of people renting rather than owning homes—point to the choice of smaller, easier-to-care-for pets.

The pet-food industry as a whole should get an added push as awareness of the psychological benefits of owning a pet increases.

Another trend is the emerging

(Continued on Page 53)

CAT-FOOD SALES

Brand	Manufacturer	1987	1988*
Canned cat food		$ in millions	
Kal Kan Whiskas	Kal Kan (Mars)	$242.6	$262.0
9 Lives	Heinz	255.5	253.3
Friskies Buffet	Carnation	175.0	200.0
Fancy Feast	Carnation	138.5	145.5
Amore	Heinz	85.0	100.0
Purina 100	Ralston Purina	86.2	88.5
Sheba	Kal Kan (Mars)	—	28.0
Puss'n Boots	Quaker Oats	21.0	22.0
Bright Eyes	Carnation	14.5	10.0
Catviar	Ralston Purina	8.0	10.5
Unique	Ralston Purina	5.0	5.0
Tabby	Alpo (GrandMet USA)	2.0	1.0
Others		161.7	135.2
Total		$1,195.0	$1,261.0
Dry cat food			
Cat Chow	Ralston Purina	$154.0	$152.0
Friskies	Carnation	91.5	92.0
Meow Mix	Ralston Purina	85.0	86.5
Kal Kan Whiskas	Kal Kan (Mars)	61.5	65.0
9 Lives	Heinz	46.4	55.0
Special Dinners	Ralston Purina	43.5	41.0
Dry cat food cont'd			
Alley Cat	Ralston Purina	43.5	51.4
Chef's Blend	Carnation	40.3	37.6
Thrive	Ralston Purina	37.0	35.8
Kitten Chow	Ralston Purina	32.0	40.6
Smart Cat	Ralston Purina	15.0	25.5
Others		102.3	109.6
Total		$752.0	$792.0
Moist cat food			
Tender Vittles	Ralston Purina	$118.3	$111.5
Happy Cat	Ralston Purina	57.5	48.4
9 Lives Tender Meals	Heinz	30.5	27.0
Moist Meals	Quaker Oats	6.4	4.5
Moist & Tender	Ralston Purina	2.6	1.0
Others		23.7	24.6
Total		$239.0	$217.0
Cat treats			
Pounce	Quaker Oats	$14.0	$14.0
Bonkers	E-II Holdings	6.2	6.0
Total		$20.2	$20.0

* 1988 figures are estimates. Source: John C. Maxwell Jr.

DOG-FOOD SALES

Brand	Manufacturer	1987	1988*
Dry dog food		$ in millions	
Dog Chow	Ralston Purina	$255.0	$255.0
Puppy Chow	Ralston Purina	155.0	155.0
Alpo Beef Flavored Dinner	Alpo (GrandMet USA)	108.0	113.5
Gravy Train	Quaker Oats	90.0	95.6
Come 'N Get It	Carnation	84.0	83.0
Kibbles and Chunks	Ralston Purina	70.0	72.0
Hi Pro	Ralston Purina	80.0	70.0
MealTime	Kal Kan (Mars)	64.4	62.0
Chuck Wagon	Ralston Purina	58.3	51.0
Mainstay	Ralston Purina	48.5	46.0
O.N.E.	Ralston Purina	45.0	50.0
Lucky Dog	Ralston Purina	40.5	40.0
Purina Blends	Ralston Purina	33.5	30.0
Cycle	Quaker Oats	30.4	48.8
Hearty Chunks	Quaker Oats	30.0	35.0
Grrravy	Ralston Purina	30.0	43.0
Fit & Trim	Ralston Purina	30.0	34.0
Puppy Chow Chewy Morsels	Ralston Purina	20.0	15.0
Hunters Choice	Jim Dandy (GrandMet USA)	12.9	13.0
Jim Dandy Chunk & Ration	Jim Dandy (GrandMet USA)	11.5	11.5
Alpo Puppy	Alpo (GrandMet USA)	10.0	9.0
Gravy Train Puppy	Quaker Oats	9.0	4.0
Thrive	Ralston Purina	8.0	6.0
Ken-L Ration Biskit & Meal	Quaker Oats	7.0	6.0
Bow Wow	Piasa	6.0	5.5
Kasco	Piasa	5.5	5.5
Praise	Ralston Purina	5.0	—
Friskies Dinner & Cubes	Carnation	5.0	—
Field n' Farm	Ralston Purina	3.5	2.0
Field Master	Ralston Purina	3.3	4.0
Alamo Brand	Alpo (GrandMet USA)	2.0	—
Savor	Ralston Purina	2.0	2.0
Cadillac	Cadillac	1.6	3.0
Blue Mountain	Associated Products	1.3	1.0
Vets Nuggets'	Heinz	1.3	1.0
Strongheart	E-II Holdings	1.2	1.0
Gaines Meal	Quaker Oats	0.8	0.6
Others		430.5	425.0
Total		$1,800.0	$1,799.0
Moist dog food			
Gainesburgers	Quaker Oats	$47.0	$38.5
Top Choice	Quaker Oats	20.5	13.8
Ken-L Ration Special Cuts	Quaker Oats	20.0	17.4
Moist & Meaty	Ralston Purina	20.0	32.5
Ken-L Ration Burgers	Quaker Oats	20.0	16.4
Smorgasburger	Quaker Oats	12.5	13.0
Moist'n Beefy	Quaker Oats	4.0	9.5
Prime/Puppy Choice	Quaker Oats	1.5	1.2
Others		49.5	49.7
Total		$195.0	$192.0
Dog treats			
Milk-Bone & others	Nabisco Brands	$159.1	$163.7
Chew-eez & others[2]	Superior Brands	40.0	43.0
Jerky Treats	Heinz	36.7	37.3
Meaty Bones	Heinz	26.5	30.0
Bonz	Ralston Purina	21.0	19.0
Alpo Jerky	Alpo (GrandMet USA)	13.0	13.0
Hearty Chews	Ralston Purina	12.0	15.0
Alpo Snaps	Alpo (GrandMet USA)	11.5	11.0
Snausages	Quaker Oats	10.5	9.3
Pup-Peroni	Quaker Oats	10.0	12.5
Beef Bites	Alpo (GrandMet USA)	7.4	7.8
100% Natural Treat	Quaker Oats	5.0	7.0
Cheesedawgs	Ralston Purina	3.0	5.4
Marrow Bone	Kal Kan (Mars)	2.0	1.0
Tasty Chunks	Quaker Oats	2.0	1.5
Recipe	Heinz	1.5	1.2
Say Cheese, People Crackers	Hi-Life	1.1	0.8
Others		34.2	51.5
Total		$396.5	$430.0
Canned dog food			
Alpo	Alpo (GrandMet USA)	$240.0	$262.0
Kal Kan Pedigree	Kal Kan (Mars)	160.0	200.0
Mighty Dog	Carnation	98.0	88.0
Cycle	Quaker Oats	72.3	65.0
Ken-L Ration	Quaker Oats	50.0	45.0
Skippy, Premium'	Heinz	39.3	39.0
Grand Gourmet	Carnation	25.0	50.0
Recipe	Heinz	24.5	23.5
Vets'	Heinz	21.5	15.0
King Kuts	Quaker Oats	20.0	43.0
Gravy Train	Quaker Oats	11.0	9.0
Cadillac	Cadillac	11.0	13.0
Strongheart	E-II Holdings	9.5	7.5
Twin Pet	Allied Foods	8.0	11.0
Blue Mountain	Alpo	8.0	7.5
Skippy'	Heinz	7.5	6.8
Alpo Canned Puppy	Alpo (GrandMet USA)	7.5	6.8
Laddie Boy	Laddie Pet Food	5.0	4.5
Bone Appetit	Ralston Purina	2.0	2.0
Henny Pen	Allied Foods	1.5	0.5
MPS	Kal Kan (Mars)	1.0	0.5
Red Heart	Allied Foods	0.2	—
Others		67.2	20.4
Total		$890.0	$920.0
Soft-dry dog food			
Kibbles 'N Bits 'N Bits 'N Bits	Quaker Oats	$113.3	$151.0
Tender Chops	Quaker Oats	59.7	56.1
Moist 'n Chunky	Ralston Purina	22.5	17.8
Puppy Kibbles 'N Bits 'N Bits 'N Bits	Quaker Oats	13.2	10.5
Dinner Rounds	Heinz	4.0	3.2
Jim Dandy Tender Moist Chunks	Jim Dandy (GrandMet USA)	3.6	3.4
Total		$216.3	$242.0

* 1988 figures are estimates. [1]Purchased by Heinz from CNB Foods in 1987. [2]Superior products include Chew-eez, Wagtime Biscuits, Bone-Anza and Chew-eez Flavor Sticks. Source: John C. Maxwell Jr.

Purina selects upscale cat food

By JULIE LIESSE ERICKSON

Ralston Purina Co. is taking to O N E -upmanship to hold its lead in the $2 billion cat-food market.

Purina Select, the cat-food version of the company's upscale Purina O N E dog food, is rolling into Western markets and metropolitan New York next month as a prelude to a national rollout.

It's being marketed as the only dry cat food with real meat as the main ingredient and the first super-premium dry cat food sold in supermarkets. Purina Select will be available in two flavors: chicken and lamb, and trout and salmon.

The marketer already sells a similar product, under the ProPlan name, in non-supermarket outlets.

Purina will support the introduction with a TV and print campaign from Scali, McCabe, Sloves, New York.

Scali handled the introduction of O N E three years ago.

Purina also is trying to preen its image in the best-selling canned segment by repackaging and renaming its Purina 100 as Purina Premium, shipping now to retailers nationwide.

"Since 1986, our low price has been our major point of difference. In 1989, we're doing two things to change that: changing our name and [adding] new contemporary packaging," Purina said in retailer sales materials.

But one competitor, who asked not to be named, said: "They haven't changed the product, and the name change alone doesn't make them a premium product."

Led by the Sheba brand from Mars Inc.'s Kal Kan Foods and Fancy Feast from Carnation Co.'s Friskies PetCare unit, the premium segment is the fastest-growing in the $1 billion canned cat-food market.

Purina dominates its competition in dry cat food, with a 54.6% share, and the declining semimoist segment, with a 74% share, according to Wheat First Securities analyst John C. Maxwell Jr. But it hasn't been a serious competitor in canned products, where it lags behind Heinz Pet Products Co., Friskies and Kal Kan, with a 10% share.

Free-standing inserts and various other couponing programs will support the Purina Premium relaunch. Centra Advertising, Purina's in-house agency, handles the brand.

With these two products, Purina continues its aggressive push into cat food.

During the past year, the company has introduced Tender Vittles Lite semimoist cat food; Kitten Chow Dairy Formula; Kit N Kaboodle, Cat Menu and Cat Chow Plus dry cat foods; and Whisker Lickin's cat treats.

Mr. Maxwell's figures for 1988 show Purina leading the total cat-food market with a 34.7% share, followed by Friskies with 24.2%, Heinz with 21.7%, and Kal Kan with 17.7% #

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Pet food

(Continued from Page 43)

strength of specialty shops as a distribution channel. This channel, consisting primarily of pet shops and veterinarian practices, adds an estimated $700 million in sales. The annual growth rate of this segment has been more than 18%.

The segment is dominated by two companies, Hill's Pet Products (Colgate-Palmolive Co.) and Iams Co. Hill's, with an estimated $300 million to $350 million in revenues, has close to a 50% market share. Iams had an estimated $105 million in revenues in 1988, translating to a second place position with a 14.3% market share.

Targeting the specialty-store consumers will hold an increasing attraction to the mass-market manufacturers. In turn, sales through this channel will rise at a faster rate than sales through food stores.

Another continuing trend is the consolidation and concentration of the players in the market. The top six companies now comprise more than 81.1% of the total industry.

Due in part to a forecast of continued mergers and acquisitions, and in part due to the difficulty of entering the industry, concentration should continue. Consolidation is likely to occur especially rapidly within the universe of companies that primarily distribute through non-food channels. Most of the market other than Hill's and Iams is made up of a number of small, privately held companies.

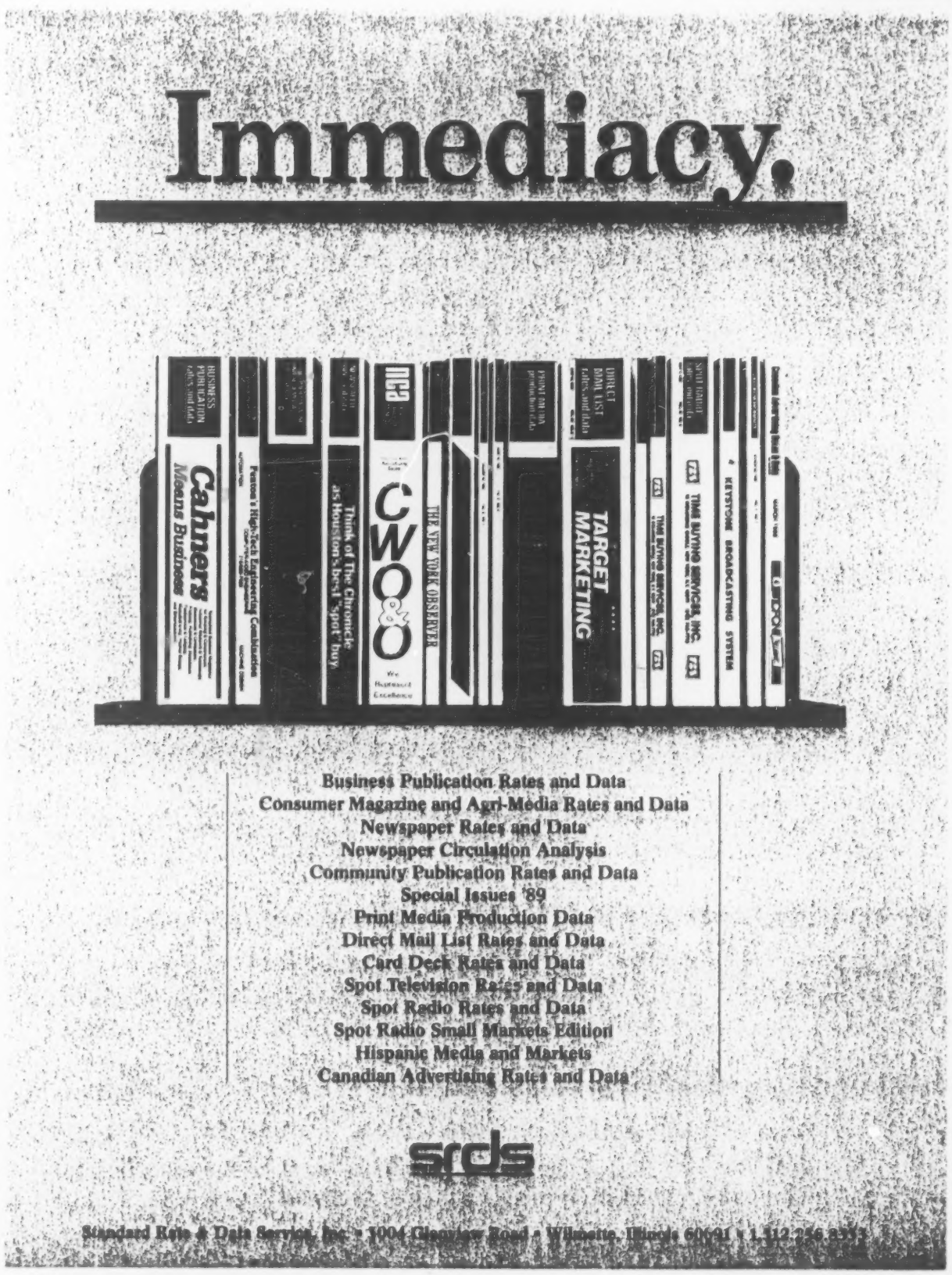
This past year didn't witness a mass proliferation of new products, but it's interesting that a few industry experts believe product introductions will increase in the next couple of years. It appears product introductions in the future will be a balance between a re-emphasis on core brands and the targeting or creation of niche markets.

The trend of trading up products also will continue. Witness the change of Kal Kan to Kal Kan Pedigree, and the emphasis on "premium" brands, as volume growth stays modest and companies seek ways to increase dollar sales.

Companies such as Alpo with Alpo Lite, Purina with Pro Plan Lite Formula and Quaker with Cycle 3 Lite have introduced "diet" pet foods.

It appears this is a potentially large segment for the pet-food industry as a whole, but most of the growth will be in the area of dog food. This is due to a much higher percentage of dogs (40%) being obese compared with cats (10%), based on a survey of veterinarians' patient characteristics #

Mr. Maxwell is with Wheat First Securities, Richmond, Va.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MediaWorks

LAUNCHING PAD

New publication launches.

'B.CV'

InterVision will introduce, with a fall issue, *B.CV*, or "Before *CareerVision*," a twice-yearly magazine for college-bound high school juniors and seniors. *CareerVision* is a magazine for college students launched last February by InterVision. *B.CV* will be distributed to 250,000 students at more than 1,250 high schools. A b&w or color page is $9,000. Kathi Doolan is publisher. Offices are at 251 Park Ave., New York 10010. Phone: (212) 475-8200.

'Career Futures'

Career & Information Services introduced, with a spring issue, *Career Futures*, a quarterly aimed at college upperclassmen and recent graduates. "We provide our readers with the information they need to make a successful transition from their education to real life," said

founder and Publisher Dennis Flavin, former publisher of the now-defunct *Business Week Careers*. Circulation, paid and controlled, is 650,000. A b&w page is $17,062, and a color page is $22,750. Denis Meacham is editor, and Jack Cortissoz and William Flavin are ad directors. Offices are at 70 Seaview Ave., Stamford, Conn. 06902. Phone: (203) 353-7060.

'Get Into Golf'

Times Mirror Magazines will introduce, with a February test issue, *Get Into Golf*, an offshoot of its *Golf* magazine. The new publication will be aimed at "the millions of people just taking up the game, returnees and infrequent players," the company said. No frequency has been set pending the results of the test issue. Initial rate base is 265,000, all newsstand. A b&w page is $8,000, and a color page is $12,000. Peter Bonanni is publisher, Robin McMillan is editor and James Ransford is ad director. Offices are at 2 Park Ave., New York 10016. Phone: (212) 779-5000. #

NEWSSTAND

A listing of print advertising opportunities.

Child, New York, "The family traveler" special advertising section, September/October issue; ad close: June 27. B&w one-sixth page: $1,800.

Country Journal, Harrisburg, Pa., "Greenhouse gardens" special editorial section, September/October issue; ad close: June 27. B&w page: $8,295; color page: $11,600.

In Fashion, New York, "Russia's styles in America" special editorial feature, September issue; ad close: June 27. B&w page: $5,050; color page: $7,250.

New England Business, Boston, "The presidents' report" special editorial feature, August issue; ad close: June 28. B&w page: $5,040; color page: $6,500.

Details, New York, "Women's Paris collections" special editorial section, September issue; ad close: June 30. B&w page: $3,650; color page: $5,800.

New Miami, Miami, "First anniversary" special editorial issue, August issue; ad close: June 30. B&w page: $1,895; color page: $2,385.

New York Yankees, Bronx, N.Y., "Hall of Fame day" special editorial issue, Aug. 31 issue; ad close: June 30. B&w page: $1,750; color page: $2,425.

Psychology Today, New York, "Learning" special editorial supplement, September issue; ad close: June 30. Color page: $33,920.

The Village Voice, New York, "Rock 'n' roll quarterly" special editorial supplement, July 18 issue; ad close: June 30. B&w page: $6,360; color page: $7,210.

Popular Mechanics, New York, "Recreational shooting" special editorial report. October issue; ad close: July 1. B&w page: $29,621; color page: $39,943.

Profitable Craft Merchandising, Peoria, Ill., "Christmas preview" special editorial feature, August issue, ad close: July 1. B&w page: $2,435; color page: $3,980.

Elle, New York, "Solar/polar style" special advertising section, November issue; ad close: July 3. Color page: $30,000.

Prevention, Emmaus, Pa., "The 100 best diet and healing foods" special editorial section, September issue; ad close: July 3. B&w page: $27,910, color page: $36,565.

Rolling Stone, New York, "Woodstock 20th anniversary" special editorial issue, Aug. 24 issue, ad close: July 3. B&w page: $28,090; color page: $40,035. #

RATINGS & RESEARCH

Ratings and research developments of interest to media buyers.

MTV Networks vs. the people meter. How many kids and teens are *really* watching those TV sets?

Far more than are reported by Nielsen Media Research's people meters, contend many programmers.

Now MTV Networks and J. Walter Thompson USA are circulating the results of a telephone coincidental survey (asking kids and teens what they're viewing at that moment) and arguing the data demonstrate a stubborn, sizable undercount.

The phone survey was conducted this spring, and its results are similar to a phone survey from February 1988. Both showed significantly more viewing of MTV, Nickelodeon and others kids' fare than was recorded by the people-meter sample.

The new nationwide phone survey covered more than 75,000 TV viewers contacted by Nielsen between March 13 and April 16. Viewers were selected at random.

For MTV Networks' Nickelodeon, the survey indicated the viewer-per-viewing-household figure for children ages 2 to 11, as reported by the people meter, was 24% lower (0.92) than reported in the phone survey sample (1.21).

For syndicated weekday kids' TV programming, the people-meter figure (0.71) was 25% lower than the phone survey results (0.95); for Saturday morning network kids' programming, the people-meter figure (0.71) was 11% lower than the phone survey results (0.80).

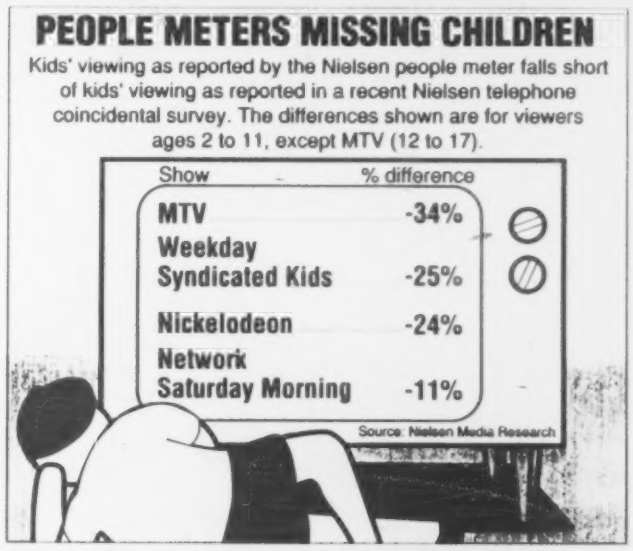
The phone survey also showed the people meter understated the viewer-per-viewing-household figure for MTV by 34% (0.39 instead of 0.59 as measured in the phone survey) for teens ages 12 to 17 and by 32% (0.30 instead of 0.47) for young adults ages 18 to 24.

"Children can successfully operate microwave ovens, videocassette recorders and TV remote controls but may not be willing to operate people meters on an ongoing basis. There is no tangible reward for doing so," said Debbie Solomon, VP-research at JWT.

Nielsen Media Research Exec VP John Dimling admitted there's a problem and said the phone coincidental survey, while not a definite measurement, "supports the conclusion that the people meter understates teen and kids viewing."

The solution: passive people meters. But Nielsen doesn't expect the passive meters to be in use before 1992. #

Written by Wayne Walley.


PEOPLE METERS MISSING CHILDREN
Kids' viewing as reported by the Nielsen people meter falls short of kids' viewing as reported in a recent Nielsen telephone coincidental survey. The differences shown are for viewers ages 2 to 11, except MTV (12 to 17).
Show
% difference
MTV -34%
Weekday Syndicated Kids -25%
Nickelodeon -24%
Network Saturday Morning -11%
Source: Nielsen Media Research

John Heiland

THE PRINTED WORD

Magazines sport ad-page jumps

Print media advertising and circulation performance.

Public interest in sports is at an all-time high. Total attendance for 11 major sports reached 442 million last year, a record, an annual survey by the *Daily Racing Form* found.

The sports media marketplace is booming, too.

Broadcast rights fees for major sports are soaring. Regional sports channels are popping up on television from coast to coast; ESPN, once the only 24-hour national sports network, now faces competition from SportsChannel America and the recently announced Mizlou Sports News Network.

As the public's appetite for sports event programming grows, so does its thirst for sports news and information. At least two national consumer sports publication launches have been announced in the past year.

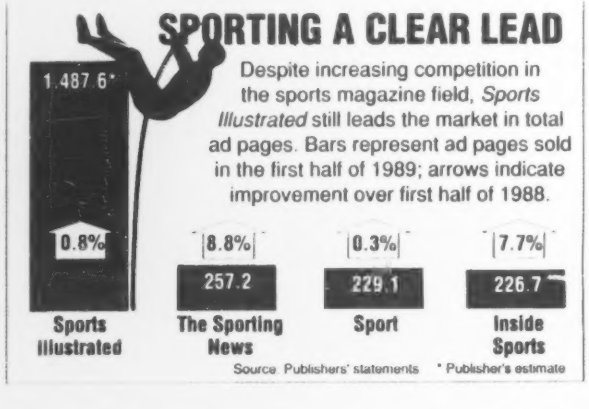
ESPN's new *TV Sports*, which made its debut in January, is a monthly guide to sports programming distributed through 2.1 million Sunday newspapers.

Former *New York Post* Publisher Peter Price, former *Sports Illustrated* writer Frank Deford and Univisa this fall will launch a daily sports newspaper, tentatively titled *The National*.

The paper will compete primarily with the sports section of *USA Today*.

The new publications don't have much of a shot at overthrowing *Sports Illustrated*, the undisputed heavyweight champion of sports print. They may heat up the race for the No. 2 ranking, a position not forcefully claimed by any of *SI's* current competitors.

This week, "The Printed Word" scouts the nation's top general-interest sports publications.



Holly Segurine

Sports Illustrated, New York (Time Inc.): *SI's* ad-page count leveled off in the first half of '89 after dramatic growth during the 1988 Olympics. The weekly remains—far and away—the king of the sports publishing hill. Last year, *SI* ranked third among *all* magazines in ad revenues, taking in $323.9 million, and eighth in ad pages with 2,978. An offshoot, *Sports Illustrated for Kids*, was introduced in January.

Ad pages—(first-half 1989) 1,487.6, up 0.8%; (full year 1988) 2,978, up 12.3%.

Rate base—3,150,000.

Color cost per thousand—$33.40.

The Sporting News, St. Louis (Times Mirror Co.): This 103-year-old newspaper is *SI's* only weekly competition. Editorially, *TSN* tries to distance itself from the rest of the pack and has earned a reputation as a statistic-filled, nuts-and-bolts newspaper for the serious sports fan. Ad pages dipped in '88, but the newspaper has seen the greatest percentage growth in pages among sports publications for the first half.

Ad pages—(first-half 1989) 257.2, up 8.8%; (full year 1988) 578.8, down 8.2%.

Rate base—725,000.

Color CPM—$26.90.

Inside Sports, Evanston, Ill. (Inside Sports Inc.): *Inside Sports* was launched in 1980 under the auspices of *Newsweek* and, under its third and current owner, has become serious competition for its closest rival, *Sport*. The increased competition has led both books to beef up their editorial products and tinker with their looks.

Ad pages—(first-half 1989) 226.7, up 7.7%; (full year 1988) 419.0, up 2.9%.

Rate base—500,000.

Color CPM—$29.

Sport, Los Angeles (Petersen Publishing Co.): The 43-year-old monthly was in a slump when Petersen acquired it last July, but seems to be rebounding nicely after intense physical therapy. The publisher trimmed the magazine's rate base and rates, expanded its editorial and use of color, and added more special issues focusing on major sporting events. The June issue was the magazine's largest to date under Petersen, with 56.8 ad pages, a 35.8% increase from a year earlier.

Ad pages—(first-half 1989) 229.1, up 0.3%; (full year 1988) 424.4, down 11.3%.

Rate base—850,000.

Color CPM—$30. #

Written by Scott Donaton.

Cyclamate could have comeback

By LAURIE FREEMAN

The U.S. Food & Drug Administration could reapprove the use of cyclamate as an artificial sweetener by yearend. Cyclamate was banned about 20 years ago.

Unlike NutraSweet Co.'s aspartame, cyclamate is heat-stable and can be used in baking.

"Cyclamate could be used in any food category where low-calorie sweeteners are used now with even more applications like baked goods and heated foods," said Russell Lemieux, a spokesman for the Calorie Control Council. "It means more low-calorie sweetener options and ultimately more low-calorie food and beverage choices."

The council, representing soft-drink marketers, and Abbott Laboratories, the only remaining U.S. cyclamate manufacturer, asked the FDA to lift its ban.

An FDA official last month said the ban was a mistake. At the time, cyclamate was believed to cause bladder cancer.

"There's a good deal of ground left to cover. . . . It's not likely to be given the green light before the end of the year," said Emil Corwin, the FDA spokesman.

Cyclamate is marketed overseas as a tabletop sweetener and as a blending element in other foods, including soft drinks.

Pepsi-Cola Co. and Coca-Cola USA said they're closely watching the FDA's actions on cyclamate. Pepsi said it uses cyclamate in some products sold overseas.#

NutraSweet rivals loom

(Continued from Page 3)

approval by the U.S. Food & Drug Administration.

In April, Pfizer assigned its Altame sweetener, which is 2,000 times sweeter than sugar, to Bozell with an estimated $25 million-to-$30 million budget (AA, April 24). The assignment involves Bozell Public Relations, Bozell Healthcare and Poppe Tyson for the creation of a unified and far-reaching campaign.

McNeil has named Lowe Marschalk as its agency for sucralose, said to be 600 times sweeter than sugar. (NutraSweet is 200 times sweeter than sugar.)

McNeil said it would be premature to comment on ad plans until FDA approval is granted.

The company, however, is expected to keep pace with Pfizer's spending.

McNeil asked the FDA in February 1987 for approval to market sucralose in 15 product categories, including tabletop sweeteners, carbonated and non-carbonated beverages, baked goods, milk, frozen desserts and salad dressings.

Sucralose, derived from sugar, has no calories and is stable enough to be used in baked and frozen products, a spokesman said. Aspartame, in its current form, isn't heat-stable.

How does NutraSweet plan to respond to the competition?

"What competition? What new products? At this point, there's only one [Hoechst Celanese's Sunette, or acesulfame-K] on the market. That's just not enough at this point for us to make any change in our ad and marketing strategy," said a NutraSweet spokesman.

"In our view," he said, "consumers in this category look at taste, and in our research, consumers prefer the taste of NutraSweet."

The lion's share of new category spending will likely go behind sweeteners as ingredients for package foods, by far the largest segment of the sugar substitute market.

About 85% of all sweeteners are used as ingredients, and of that amount, 60% is used in soft drinks. Tabletop sweeteners account for only 15% of all use, according to Reach Associates, a consulting company.

Sunette has FDA OK

Hoechst Celanese's Sunette has had FDA approval for almost a year for use in desserts, dry beverages, chewing gums, desserts and puddings.

The company, a unit of West Germany's Hoechst AG, named Bergelt Litchfield to handle Sunette. Spending is limited to trade advertising this year.

The company's ad and promotional efforts, due to break this fall, will be aimed at increasing its number of ingredient licensees, a Bergelt spokesman said.

Consumer advertising will be given a try after Sunette gets FDA approval for use in soft drinks and baking products, he said. But approval isn't expected until at least 1990.

So far, Stadt Corp. is the only U.S. marketer that plans to use Sunette as an ingredient. Sunette will be used in Stadt's new tabletop sweetener called Sweet One.

Stadt President Marvin Eisenstadt said he's disappointed Hoechst Celanese hasn't run a consumer ad campaign to promote Sunette.

"We thought they would run a campaign, but they didn't," Mr. Eisenstadt said. "So it's up to us."

Stadt doesn't have the marketing or ad budget of NutraSweet, however; it will spend $5 million starting July 15 with a network TV push for Sweet One.

The ad campaign, from Pedone & Partners, mentions Sunette as Sweet One's ingredient.

Stadt has faced NutraSweet in the past. Stadt's sister company, Cumberland Packing, markets Sweet 'N Low, the saccharin-based granddaddy of artificial sweeteners, and a competitor to NutraSweet's Equal.

First introduced in 1958, Sweet 'N Low is aimed at artificial sweetener users, while Sweet One is aimed at sugar users.

Sweet 'N Low breaks network TV spots this October that continue its ad theme from last year, "For millions, there's just no Equal." Sweet 'N Low's ad spending in 1988 was $3.2 million, according to BAR/LNA Multi-Media Service, less than half Equal's $7.4 million.

Mr. Eisenstadt said Sweet 'N Low has about a 55% volume share of sugar substitute packet sales in grocery stores, compared with Equal's 35%. But Arbitron/SAMI figures show that on a dollar basis, Equal leads the market with $124.9 million in sales compared with Sweet 'N Low's $74.6 million.

Equal costs more than Sweet 'N Low.

Perhaps the most dogged NutraSweet competitor is United Sweetener, a unit of Netherlands-based Holland Sweetener Co.

Holland Sweetener is now introducing its Sweetmatch aspartame/saccharin blend sweetener into Delaware, targeted at sugar users.

Fight over blend

NutraSweet doesn't market a blend product but holds a patent on a blend that Holland Sweetener challenged at the U.S. Patent & Trademark Office. The patent office ruled in favor of Holland, said company attorney Carl Love.

Holland Sweetener also has issued legal challenges in Switzerland, Sweden, Norway, the Netherlands and Canada.

NutraSweet expects to continue fighting United Sweetener.

"This is by no means a final step. NutraSweet Co. has two active patents: one covering the overall use of aspartame in any form [expiring December 1992] and another covering all blends made with aspartame [expiring in November 1996]. We're confident they'll remain [in effect] until expiration," the NutraSweet spokesman said.

It's not known whether United Holland has a U.S. ad agency; United Sweetener couldn't be reached.

Much further away from market are five P&G sweeteners; they've been patented but haven't yet been put before the FDA for approval.

Company spokesman Don Tassone said P&G originally planned to use the sweeteners in its Crush soft-drink line, but now that business has been put on the block.

Still, a Crush sale won't deter the company from developing the new sweeteners, though it's not clear now whether they will be sold as ingredients, used in-house or both.

General Foods USA last summer said it might apply for FDA approval for two new artificial sweeteners called PS 99 and PS 100 that are between 2,000 and 2,500 times sweeter than sugar.

Although General Foods had no comment about its plans for the sweeteners, it's apparent that both PS 99 and PS 100 have applications in most all General Foods existing product lines. For example, the sweeteners could be used in powdered and carbonated soft drinks, bakery products, powdered desserts, dairy products, canned goods and tabletop sweeteners.

Whether the company will also market the sweeteners to competing food companies isn't known.#

Laurie Freeman in Washington and Julie Liesse Erickson in Chicago contributed to this story.

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New Tyson process aims to freeze out competition

By CHRISTY FISHER

Tyson Foods is preparing a July rollout of a new frozen chicken product in a bid to increase its supermarket presence.

The introduction of Tyson IQF chicken will be backed by an estimated $4 million print campaign from Saatchi & Saatchi Advertising, New York. Newspaper ads could start as early as July with a magazine push in the fall.

The poultry marketer will use a method of freezing chicken that preserves freshness. Until now, the individually quick-frozen process was only used for chicken bound for the foodservice industry, said Jack Dunn, Tyson's senior VP-retail marketing.

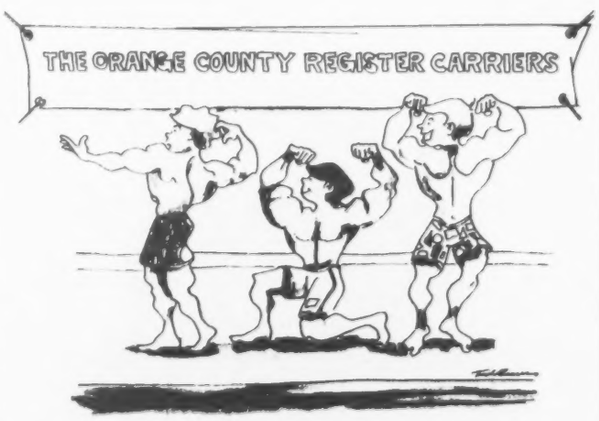
With the method, individual chicken pieces are instantly frozen and covered with an ice glaze just 8 hours after the chicken has been slaughtered, when the meat is most tender, Mr. Dunn said.

Rollout plans call for a 16-market introduction with national distribution set for completion by yearend.

Ads will educate consumers about the IQF method and include a $1-off coupon. Tyson will continue its "Feeding you like family" TV campaign, introduced in April (AA, Feb. 13).

Also next month, the company will introduce a ground chicken product, with no ad support.

Of the estimated 355 million pounds of chicken produced weekly for foodservice and supermarket sales, No. 1 Tyson has a 13.1% share, followed by 8.9% for ConAgra and 7.6% for Holly Farms, said John McMillin, an analyst with Prudential-Bache Research. But Tyson has only a "very small" share of the $1 billion branded chicken category, he said. Holly Farms leads with 19%, followed by Perdue Farms and ConAgra at 6% each.#



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